Schedule
VIEW.com
John
Mary
Monday
Appointment
Scheduling Software

Schedule
PLUS
VIEW.com
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Appointment
Scheduling Software

User manual

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WELCOME

WHAT ScheduleVIEW™ CAN DO FOR YOU AND YOUR BUSINESS

As a business owner, you know that time is money. Missed appointments and no-shows cost even the smallest businesses thousands of dollars in lost revenue each year. Effectively managing customer relationships, resource availability, and provider productivity is *essential* to maximizing the effectiveness and the profitability of any business.

ScheduleVIEW™ is *your* answer. Designed from the ground up for businesses that want an easy-to-use, yet flexible scheduling solution for single or multiple users. **ScheduleVIEW™** is more than just appointment setting or day planner software, **ScheduleVIEW™** also helps manage the entire appointment process for your business. Find the next available appointment for a specific provider or resource. Track the status of an appointment throughout its cycle. Setup and maintain a waiting list of appointments, automatically finding ways to make the most of your business' time and resources. **ScheduleVIEW™**'s advanced appointment reminder system allows you to print and mail, or email, reminders to your customers, reducing the costly impact of no-shows on your business.

And we didn't stop there!

ScheduleVIEW™ helps you manage your customer information through a powerful customer database system that lets you track customer appointment history with a click of a button. But appointment history is just the beginning! **ScheduleVIEW™**'s customer database allows you to keep notes on each appointment, add documents or charts of critical information to the customer's file. You can even record referral sources, keep a photo of the customer or the customer's equipment, store driving directions for your employees and even keep birthday information for birthday greetings! But that's not all! Your business is unique and so are your information needs. **ScheduleVIEW™** lets you define your own custom fields to accommodate what you want to know and track about your customers.

But that's not all! By setting up your employees and contractors as providers, and rooms and equipment as resources in the **ScheduleVIEW™** system; you can now schedule and track breaks, time off and down time. Your business's productivity is available at a touch of a button with our powerful reports.

ScheduleVIEW™'s reporting system lets you look at your business' productivity and profitability in multiple ways. Find out where your referrals are coming from and what geographic areas hold the most marketing potential. From tracking no-shows and cancellations to helping determining repeat visits and top revenue-producing services and providers, **ScheduleVIEW™** gives you multiple ways to look at your business!

And we made it all easy for you!

ScheduleVIEW™ has a familiar MS-Windows *look and feel* that makes learning intuitive and easy – even for first-time users. Our fast "drag 'n drop" interface lets you drag and drop an existing appointment to another time, or even lets you assign the appointment to another provider. This is a great feature if one of your providers is getting behind for the day and someone else can cover for them, maximizing your staffs' productivity.

And that's not all! **ScheduleVIEW™** has a customizable color-coding system that allows you to know who and what the customer is scheduled for, just by glancing at the appointment window. View multiple providers and resources on one window at the same time to see available time slots.

Look at your appointments *your* way. With **ScheduleVIEW™'s** customizing options your appointment calendar has all the information that you need to best manage your business, on one window.

Need to import customer data from other scheduling or database systems? Don't worry about reentering all that information. **ScheduleVIEW™** makes it easy with our Import Wizard. If you can export your existing data into a format that **ScheduleVIEW™** can read, then you can import your data into **ScheduleVIEW™**.

And **ScheduleVIEW™ Plus** *makes it even better!*

ScheduleVIEW™ Plus extends the power of **ScheduleVIEW™.** Now, your **ScheduleVIEW™ Plus** data can synchronize with **QuickBooks Pro 2002, Quickbooks Premier 2003, 2004;** or **Outlook 1997, 1998 or 2000** so that you only have to enter data once! Get popup notifications of appointments. Email appointment reminders to providers. Prevent double booking, and further customize your **ScheduleVIEW™** to match your business' terminology. And we've included even more reports and reporting options!

ScheduleVIEW™ LITE, STANDARD AND PLUS

FEATURES AT A GLANCE

Feature	ScheduleVIEW™ LITE	ScheduleVIEW™ STANDARD	ScheduleVIEW™ PLUS
Print Birthday Labels	No	No	**Yes**
Customer Letters	No	No	**Yes**
Customer Statistical Report	No	No	**Yes**
Provider Analysis Report	No	No	**Yes**
Service Code Analysis Report	No	No	**Yes**
Waiting List Report	No	No	**Yes**
Customize Terms	No	No	**Yes**
Customize What Shows on Calendar Screen	No	No	**Yes**
Customize What Prints on Grid Report	No	No	**Yes**
Ability to block Double Booking of Appt's	No	No	**Yes**
Pop-up Appointment Reminders	No	No	**Yes**
Advanced Reports (5 Additional Reports 1- Customer Stat Report; 2- Provider Analysis Report; 3-Service Code Analysis Report; 4: Waiting List Report; 5- Customer Mailing Labels)	No	No	**Yes**
* Sync Customer Demographics with QuickBooks Pro/Premiere/Enterprise	No	No	**Yes**
* Ability to create QuickBooks Invoices Without Double-Entry of Customer Demographics	No	No	**Yes**
Customer Email Messages	No	**Yes**	**Yes**
Customer Definable Fields	No	**Yes**	**Yes**
Appointment Definable Fields	No	**Yes**	**Yes**
Track Authorized Visits	No	**Yes**	**Yes**
Productivity Report	No	**Yes**	**Yes**
Print Mailing Labels	No	**Yes**	**Yes**
Revenue Generation Report	No	**Yes**	**Yes**
Authorized Visit Alert Report	No	**Yes**	**Yes**
Referral Source Report	No	**Yes**	**Yes**
Missed Appointment Report	No	**Yes**	**Yes**
Available Appointment Report	No	**Yes**	**Yes**
Zip Code Referral Report	No	**Yes**	**Yes**
Service Code Recall Report	No	**Yes**	**Yes**

Feature	ScheduleVIEW™ LITE	ScheduleVIEW™ STANDARD	ScheduleVIEW™ PLUS
Send Appointment Reminders	No	**Yes**	**Yes**
Customize Customer Information Page	No	**Yes**	**Yes**
Create & Send/Print Superbills; Encounter Forms; Work Orders	No	**Yes**	**Yes**
Security – Set Providers to access only their own Schedule	No	**Yes**	**Yes**
Security – View Only Feature.	No	**Yes**	**Yes**
Security – Individual Login and Password with Customizable Levels of Access (NOTE; LITE is not recommended for medical offices.)	No	**Yes**	**Yes**
Security - have the ability to automatically Log Off after a period of inactivity. NOTE: Medical offices should NOT purchase the LITE version due to HIPAA issues.	No	**Yes**	**Yes**
List of Customers who have not had an appointment for a specific service code in a specified time frame. (Great for service businesses that provide regular, periodic, recurring services)	No	**Yes**	**Yes**
View Providers, Resources, Groups	**Yes**	**Yes**	**Yes**
Email Enabled	**Yes**	**Yes**	**Yes**
View Day, Week or Month at a Glance	**Yes**	**Yes**	**Yes**
Color Code Appointments	**Yes**	**Yes**	**Yes**
Create Appointment Templates	**Yes**	**Yes**	**Yes**
Appointment Info Window	**Yes**	**Yes**	**Yes**
Double Click to Edit or Make Appointment	**Yes**	**Yes**	**Yes**
Schedule Multiple Providers/Resources	**Yes**	**Yes**	**Yes**
Import From .CSV Format File	**Yes**	**Yes**	**Yes**
Ability to set Repeating Appointments	**Yes**	**Yes**	**Yes**
Change Zip Code or Phone Number Format	**Yes**	**Yes**	**Yes**
Search for Existing Appointments	**Yes**	**Yes**	**Yes**
Save 'Directions' and 'Notes'	**Yes**	**Yes**	**Yes**
Network Ready	**Yes**	**Yes**	**Yes**
Easy to Setup and Use	**Yes**	**Yes**	**Yes**
Customizable	**Yes**	**Yes**	**Yes**

Feature	ScheduleVIEW™ LITE	ScheduleVIEW™ STANDARD	ScheduleVIEW™ PLUS
Advanced Search Features	Yes	Yes	Yes
Waiting List Feature	Yes	Yes	Yes
Archive Data	Yes	Yes	Yes
Print SSN or Date of Birth on Appointment List	Yes	Yes	Yes
Appointment Status Report	Yes	Yes	Yes

* To sync between SCHEDULEVIEW™ and QuickBooks:
You must have SCHEDULEVIEW™ PLUS and QuickBooks Pro, Premier or Enterprise 2002 or newer.

ScheduleVIEW™ LITE FEATURES

Great for single person offices, home users, and for basic scheduling needs. You get the user friendly interface that ScheduleVIEW™ is famous for, PLUS you can upgrade to a higher version at any time for the difference in price -- you can't go wrong! (WARNING- this version is NOT recommended for Medical Practices because it does not have security features needed for HIPAA.) Does **not** include QuickBooks or Outlook Calendar Synchronization.

Flexible Configuration: **ScheduleVIEW™** can be configured for single users or for networked groups.

A Comprehensive Customer Information Database: **ScheduleVIEW™** includes a powerful customer database that allows storage of photographs in customer records, website and email information, appointment history, driving directions, referral information, insurance policies and companies.

A Resource and Provider Management Tool: Set up and manage your resources: office space, vehicles and tools as well as establishing and maintaining employee and other providers' availability.

A Powerful Appointment Setting Tool: The heart of **ScheduleVIEW™** is its' appointment setting and management tool that quickly determines the availability of resources and providers in setting up appointments for your customers, it also maintains a status and history of those appointments. **ScheduleVIEW™** also allows you to create and manage a waiting list ensuring that appointments won't get missed.

Data Sharing Between Applications: **ScheduleVIEW™** imports from database and spreadsheet applications, such as Access and Excel. **ScheduleVIEW™** exports data in the following formats:

- Word (.doc)
- Excel (.xls)
- HTML for websites (.html)
- Rich Text Format File (.rtf)
- Comma Separated Value (.csv) (comma delimited)
- Text Files (.txt)
- XML Files (.xml)
- Adobe Acrobat (.pdf)

NOTE: not all formats are available in all parts of the program

Easy to Customize: Change colors, views, and appointment blocks easily. **ScheduleVIEW™** allows you to set up your schedule the way you like it to look.

ScheduleVIEW™ STANDARD FEATURES

Ideal for small offices, busy executives, and companies that need their database password protected. Includes the ability to add custom fields of information for more robust tracking of information; includes password protection and security levels; and includes productivity report; mailing labels; revenue generation report; available appointment report; missed appointment report; service code recall report (a MUST HAVE report if you sell repeating services or products- this ONE feature only can make you literally THOUSANDS of dollars a year in revenues); includes the ability to print Superbills, Encounter Forms, Work Orders, and Service Tickets; and includes sending appointment reminders (Some competitors charge as much for just this one feature as we do for our whole program!! Go figure!). Does NOT include QuickBooks or Outlook Calendar Synchronization. Price Protection- You can always upgrade to the PLUS version for the difference in price. This is our ORIGINAL scheduling product and a great version to start with.

Customer and Appointment Definable Fields: **ScheduleVIEW™** STANDARD allows you to add fields into your customer and appointment screens for specialized informaiton.

Reports: 8 additional reports are added which are unavailable in **ScheduleVIEW™** LITE.

Customize Customer Information Page: **ScheduleVIEW™** STANDARD allows you to choose what information is requested in your customer information screen.

Create and Send/Print Superbills, Encounter Forms, Work Orders: Custom forms may be created including using Word documents or Excel forms using **ScheduleVIEW™** STANDARD.

Enhanced Security: Individual login and password capability, with customizable levels of access.

View Only Security Level: This allows you to safely allow others to view the schedule without concern for unauthorized changes.

Provider Security: Great for businesses with multiple Providers, Technicians etc. Set security so that each person is only able to view their own information.

ScheduleVIEW™ PLUS FEATURES

QuickBooks/Outlook Synchronization: Synchronize data between **ScheduleVIEW™** PLUS and your QuickBooks or MS Outlook Applications, so that you only have to enter data once! (**QuickBooks Pro, Premier or Enterprise 2002 and newer; or MS Outlook 1997 and newer.)**

Change Or Set Terms: Change **ScheduleVIEW™**'s terminology to suit your particular business needs. Are your customers - students, patients, or clients? Are your providers - therapists, counselors or technicians? Are your resources - vehicles, equipment or conference rooms? Make **ScheduleVIEW™** Plus look like your business.

Modify Or Change What Appears In The Appointment Grid: What information is most important to your business when looking at appointments? Now **ScheduleVIEW™** Plus allows you to select the customer and appointment information you want to see in the Calendar screen.

Customize the Schedule Grid Report: When printing your daily Schedule you may choose what customer information you would like to be included.

Prevent Double Booking: Do you want to set up Security so your Users are prevented from double-booking unless they are Administrators? Or perhaps you would like a prompt to tell you the appointment slot is already booked.

Popup Appointment Reminders: Allows you to have vital information pop up a pre-set times in your schedule.

Even More Reports and Advanced Report Options!

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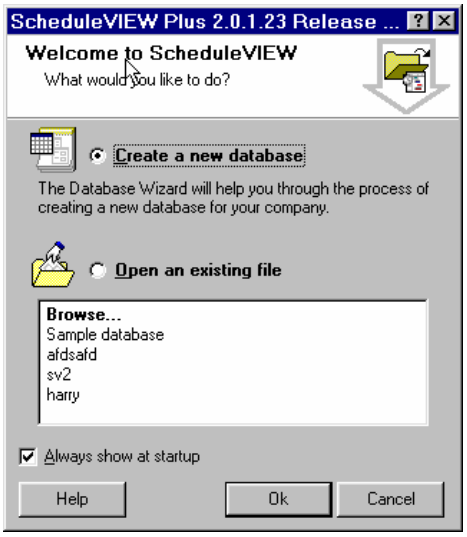
You agree to defend and indemnify SELENT AND ASSOCIATES, INC against all claims, losses, liabilities, damages, costs and expenses, including attorney's fees, which SELENT AND ASSOCIATES, INC may incur in connection with your breach of this Agreement.

INSTALLATION OF ScheduleVIEW™

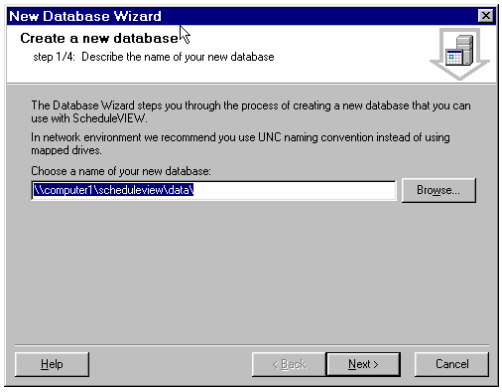


Installing **ScheduleVIEW™** is easy!

Either download the **ScheduleVIEW™** software from our website at http://www.scheduleview.com and follow the easy download instructions. Or use the CD-Rom that was mailed to you, inserting it in your computer's CD or DVD drive. The installation program will automatically start. Merely follow the easy install instructions.

Toward the end of the Installation Process, the following window will popup to prompt you to create your database for **ScheduleVIEW™**. The **Create Database Wizard** will walk you through the important steps in creating a new database.

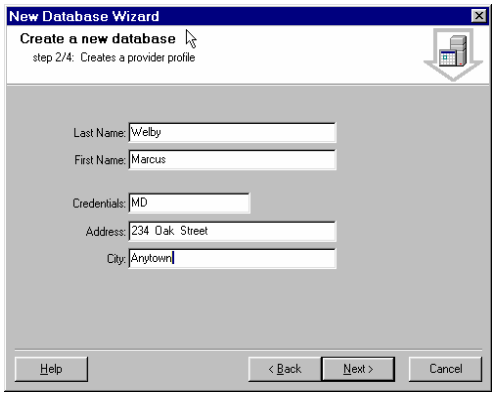
1. Give the Database a Name and Location.


New Database Wizard
Create a new database
step 1/4: Describe the name of your new database
The Database Wizard steps you through the process of creating a new database that you can use with ScheduleVIEW.
In network environment we recommend you use UNC naming convention instead of using mapped drives.
Choose a name of your new database:
\\computer1\scheduleview\data\
Browse...
Help
< Back
Next >
Cancel

First click on the "Browse" button to find the location folder for the database and give it a file name. Type in the name of the database in the white box as a description.

Remember the file name and location of the database is especially important to remember if you are networking this program with other users or computers.

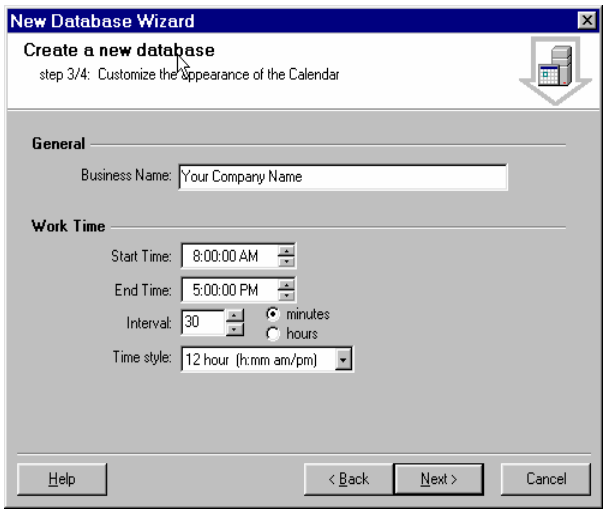
2. Create a Provider to add to the Database



You will need to create at least the first "provider" for this database. A "Provider" is someone in your organization who you will be scheduling appointments for with your customers.

You must enter at least a Last and First name here and then click **Next** to continue creating the database.

3. Customize the Appearance of the Calendar

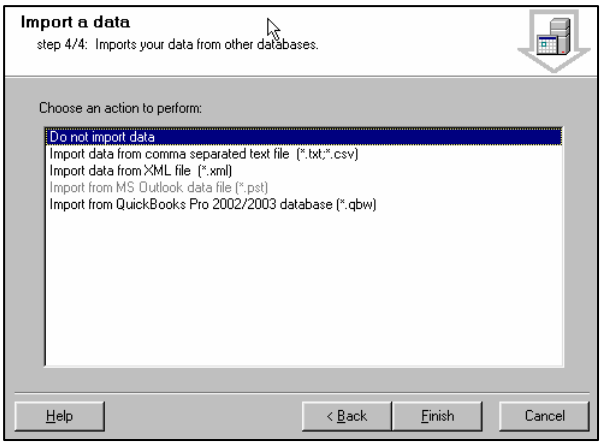


The next step in creating the database is to enter the Name of your Company or Business.

Then enter your business hours - the start and stop times of your day's appointments. Enter an Interval that is a time increment you want to display on your calendar. Choose to display by minutes or hours.

Finally enter the Time Style, choosing from 12 hour (am/pm) or 24 Hour Military Style.

4. Import Data from Other Applications.


Import a data
step 4/4: Imports your data from other databases.
Choose an action to perform:
Do not import data
Import data from comma separated text file (*.txt;*.csv)
Import data from XML file (*.xml)
Import from MS Outlook data file (*.pst)
Import from QuickBooks Pro 2002/2003 database (*.qbw)
Help
< Back
Finish
Cancel

At this point, you can decide to import or not import your data for this database from other applications or data files.

Please see the following section on Importing Data into **ScheduleVIEW™.**

If you select not to import data, clicking on **Finish** will end the Wizard. Your database is created!

When

the Installation process is finished, a new icon for **ScheduleVIEW™** will be installed on your desktop: Simply double-click on the icon that is now on your desktop to start the **ScheduleVIEW™** program. .

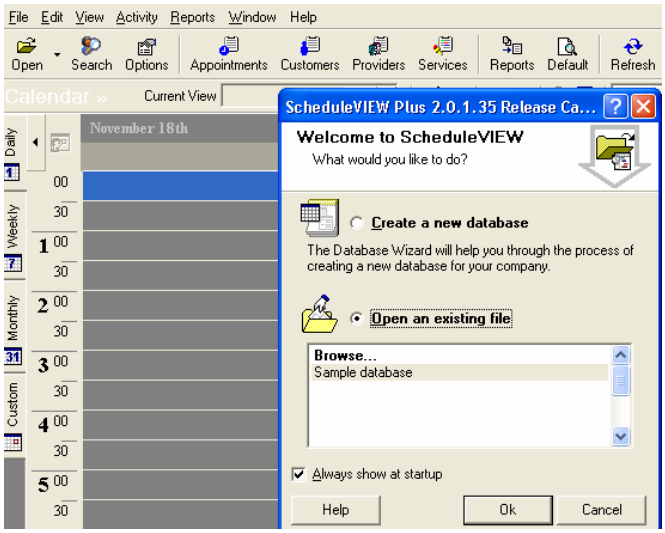
NETWORK INSTALLATION OF SCHEDULEVIEW™

ScheduleVIEW™ easily allows you to network this software. There are 3 steps in networking:

1. Install **ScheduleVIEW™** on your server or onto the computer on your network set up as your server. (NOTE; if you have a dedicated file server on your network, you probably won't install **ScheduleVIEW™** on the file server. In this case, start by installing **ScheduleVIEW™** on one of the workstations, then creating a new database, and save it on the file server.)

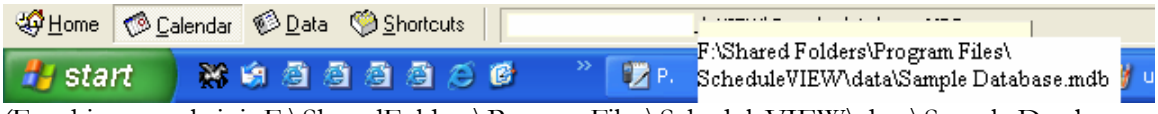
During this process, you will be prompted to create a new database. Ensure that you create this database in a **shared** folder on your network that other users can access, preferably on a server. REMEMBER THE LOCATION WHERE YOU SAVE THE NEWLY CREATED DATABASE as other network users will need this information when they install the program.

IMPORTANT-- One of the most common problems we receive in Tech Support is that users did NOT setup the folder where the **ScheduleVIEW™** database is located as a SHARED FOLDER - AND WITH APPROPRIATE ACCESS RIGHTS for all the users on the network. If you receive error messages when trying to open **ScheduleVIEW™** please try copying the **ScheduleVIEW™** database to another location where you can open other files on your network and see if it works from that location.


File Edit View Activity Reports Window Help
Open Search Options Appointments Customers Providers Services Reports Default Refresh
Calendar » Current View
Daily Weekly Monthly Custom
November 18th
ScheduleVIEW Plus 2.0.1.35 Release Ca...
Welcome to ScheduleVIEW
What would you like to do?
Create a new database
The Database Wizard will help you through the process of creating a new database for your company.
Open an existing file
Browse...
Sample database
Always show at startup
Help
Ok
Cancel

When **ScheduleVIEW™** starts, double-click the database in the previously created. (For this example it is 'Sample Database'.)

2. At the bottom of your Calendar page is the drive path, the full path will show when you put your cursor on it: write this down.



(For this example it is:F:\SharedFolders\ProgramFiles\ScheduleVIEW\data\Sample Database.mdb)

3. Install **ScheduleVIEW™** on a workstation using either your CD ROM or by downloading it from our website.

After installing the program, click on the icon on the Windows Desktop to start the application.

On the Welcome to **ScheduleVIEW™** Screen, select **Open an existing file** and then **Browse**.

Browse to your Network Neighborhood (or My Network Places), then to the computer acting as your server, (Note, you must know the Server's/Computer's name in order to proceed.) and look for the location where you created and saved your database. You will know where it is from the drive path you wrote down. (For this example you would go to your 'F' drive, then click on 'Shared Folders' then click on 'Program Files', etc until you find your database.) Your database should be residing in this folder with the .mdb extension. Then click 'Open'. Look for the **ScheduleVIEW™** files in a shared folder on the computer where you stored the database files. ** They must be in a shared folder for you to access your this database.**

TROUBLESHOOTING INSTALLATION AND NETWORKING

If you are unable to find the file it may not be 'shared' on your server. Go to your server and browse to the folder the file is in, right click on the folder and choose 'properties', make sure the folder and files are not *read-only*. (If you save files or burn files onto a CD ROM that is "READ ONLY" the database files will automatically be marked as "READ ONLY". Be sure to UNCHECK the READ ONLY when the database is saved onto the server.) Also, check the folder and file and make sure they are shared, and with appropriate user rights and security.

Check to see if you have correct security & permissions; often users must log-in as administrator to install software for machines with Windows ME, NT, XP or 2000.

Some servers have only one folder that is shared. Ensure that you set up **ScheduleVIEW™** in a shared folder, and that you have setup the proper Security and Permissions for other users to access the folder and files . (Remember that you will need to browse to the new locatoin.) If you don't understand networking, please contact your Network Administrator or computer consultant.

For a tutorial on how to network **ScheduleVIEW™,** please visit:

http://www.scheduleview.com/learning.htm

QuickStart

OVERVIEW OF ScheduleVIEW™

GETTING STARTED WITH ScheduleVIEW™

CUSTOMERS, PROVIDERS, SERVICE CODES AND RESOURCES

Ways to manage your appointments with ScheduleVIEW™

Every business consists of four primary entities:

- Individuals or Companies who **buy** products or services, or C*ustomers;*
- Individuals or Companies who **provide** the products or services that a business sells or *Providers;*
- The work or services that are bought and sold or *Services;*
- The rooms, equipment, tools or facilities needed to provide the products or services or *Resources.*

ScheduleVIEW™ manages all of these entities for your business through its flexible database structure, and customization options for viewing and managing your business' vital information.

In **ScheduleVIEW™**'s Customer **Information** database, set up customers with the vital information you need to service them. We've provided more than the standard name, phone and address structures. **ScheduleVIEW™** also allows you to store such information about your customers as internet information (website and email address), birthdays, and appointment histories. But **ScheduleVIEW™** doesn't stop there! Add in a photo of your customer, driving directions for your providers and notes for each appoint. **ScheduleVIEW™** even allows you to attach word processing files to keep a complete record of your customer relationships. *Still not enough custom information for your business?* That's ok, **ScheduleVIEW™** allows you to set up *your own* definable fields and populates them automatically with your own default values.

Providers can be employees, contract workers, or other companies. In **ScheduleVIEW™**'s database, store your provider information such as name, address, credentials, phone numbers, and email address. Set up your own provider type codes, to further classify and define your providers.

Sometimes it takes more than a customer and a provider in order to schedule an appointment. Sometimes it also takes **Resources**, a room, equipment, or facilities that allow the appointment to take place and the service to be completed. **ScheduleVIEW™** gives you the option of tracking the usage of important equipment and facilities, ensuring their availability at the right time, to service your customers' needs.

ScheduleVIEW™ allows you to create **Service Codes** that support your business by describing the types of services or work that you provide. Each Service Code entry has a required description and optionally allows you to set up defaults such as appointment colors, time lengths, and priority level. **ScheduleVIEW™** does not require the use of Service Codes but using them simplifies the appointment making process and potentially adds value in determining the profitability of your services through our reporting functions. Using Service Codes will always help you speed up the appointment making process by allowing you to define not only a length time but also a color.

If you're using **QuickBooks**, **ScheduleVIEW™ Plus** now allows you to associate Service Codes with **QuickBooks** Item Numbers and Sales Accounts, making integration and synchronization with **QuickBooks** even easier and more powerful!

DEFINABLE FIELDS AND NOTES

Looking at Customer Information Your Way.

While most businesses have a great deal of commonality in the way they look at and book appointments, your business is also unique. The information you need on your customer is critical for your business' success. **ScheduleVIEW™** gives you *the ultimate in flexibility* by allowing you to set up definable fields for your entire customer database. Even better, you can define a personal field customer by customer, ensuring that your customer information doesn't get lost or buried in someone else's business structure.

But there is even more!

ScheduleVIEW™ allows you to set up notes for each customer and pull those notes as a default into the actual appointment setting process. Have a customer who needs advanced notice before a service call or one who has sensitivity to a certain procedure or product? Document them in the customer notes and never forget it again. You can also change or add to the notes for each appointment – ensuring that information is always available - just a keystroke away!

GROUPS, WAITING LISTS AND TEMPLATES

Customizing Your **ScheduleVIEW™** *To Streamline Your Business.*

ScheduleVIEW™ allows you to organize, schedule and view providers and resources that are commonly scheduled together or that share similar skills and characteristics into **Groups**.

Are you constantly overbooked with appointments and have a "waiting" list of people who want the next "cancelled" appointment? **ScheduleVIEW™'s Waiting List** allows you add customers on the waiting list, browse the list in calendar view, prioritize the list and instantly drag and drop someone from the "waiting list" to an open time slot.

Sometimes it is important to reserve time for the most profitable service codes; for instance, a dentist might want to reserve a block of time every week for oral surgery, or a service company might want to

reserve blocks of time for equipment maintenance. **ScheduleVIEW™** helps you ensure that you set aside time for these appointments or tasks through the use of **Templates**. A Template allows you to select the service codes, providers, resources, and time period, and reserve blocks of time for a specific purpose on a one-time or recurring basis. You can even password-protect the time so that an "unauthorized appointment" cannot be added without permission.

AUTHORIZED VISITS

Keep track of authorized visits with **ScheduleVIEW™**

If you are in a service business that uses service contracts or are in a medical practice that needs to track authorized visits for insurance purposes, **ScheduleVIEW™** has your answer. Set up in your customer record the number of visits that this customer is allowed under the service contract or insurance plan. As you change each appointment's status to "completed", **ScheduleVIEW™** automatically updates the number of appointments remaining, reminding you with each scheduling and gives a warning if the appointment will exceed the number of authorized visits. You can also define a "Warning Limit" for the expiration of the authorization. As an example, a warning will popup when there are three appointments left.

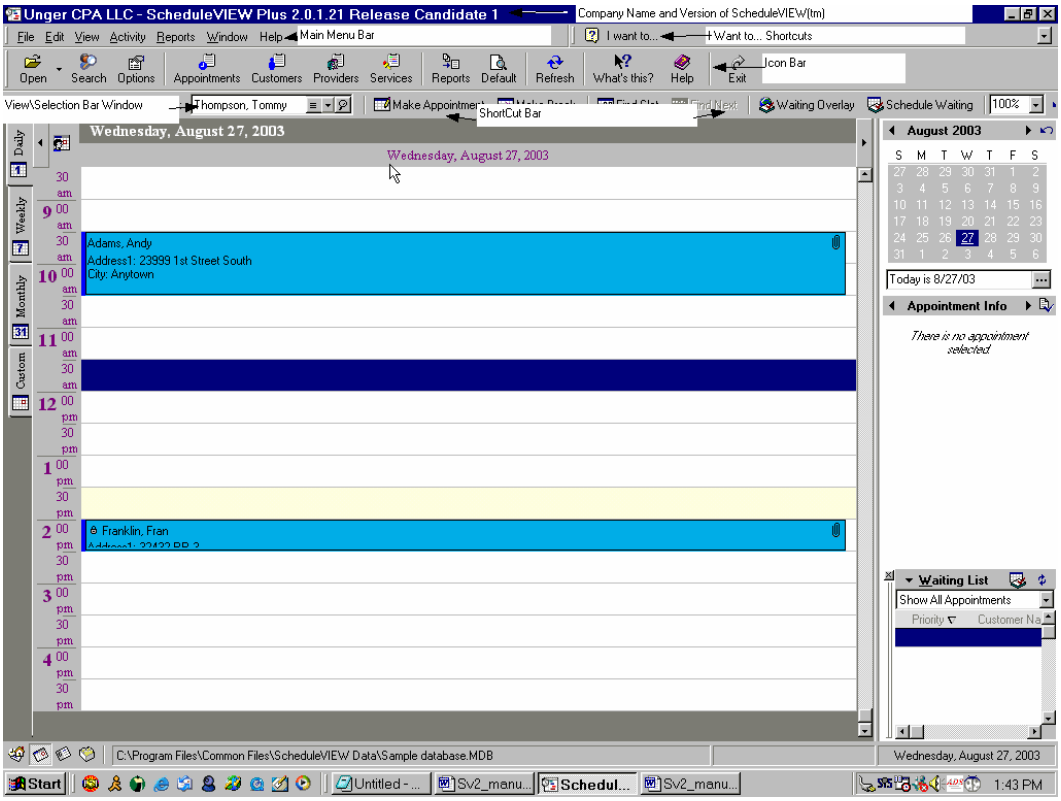
THE SCHEDULEVIEW™ INTERFACE

ScheduleVIEW™ has a number of elements that make it an easy to work with its scheduling system. Here is a quick overview of those elements and how they can help you navigate through and best utilize the **ScheduleVIEW™** system:

- The major menus and toolbars
- Important buttons and icons
- QuickKey shortcuts for navigation.

MENU AND TOOLBARS

ScheduleVIEW™ has a number of menus and toolbars that facilitate its easy navigation and use. The following summarizes these menus and toolbars. They are:



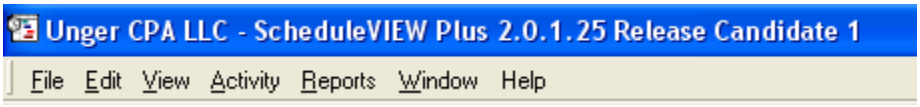
- **The Main Menu Bar** – the primary means of navigating through the **ScheduleVIEW™** system.

- **The View Bar** – the central place to change views and search for customers, resources, providers and groups.

- **The ScheduleVIEW™ Toolbar and Shortcut bar –** gives quick access to some of **ScheduleVIEW™'s** most powerful functions.

Let's take a look at each of these in detail.

➢ THE MAIN MENU



If you are used to working in a Windows environment, then the concept of a *main menu*, which runs across the top of all windows, will seem familiar. **ScheduleVIEW™** also has a **Main Menu**, which starts with the familiar **File** entry. The entries on the **Main Menu** consist of the follow:

A Quick Hint

Throughout **ScheduleVIEW™** you will find menu options with an underlined letter. Instead of using your mouse to navigate to those menu options, you can simply hold down the ALT key and press the letter that is underlined to access the same function. For instance, Alt+F will bring up the File submenu.

- **File.** For opening, closing, backing up, granting security, importing, exporting and synchronizing **ScheduleVIEW™'s** databases.

- **Edit.** Contains cut, copy, paste tools, as well as quick access to all of **ScheduleVIEW™'s** data file maintenance.

- **View** Moves between views and makes certain components of **ScheduleVIEW™** visible or invisible.

- **Activity** Contains all the major activities in **ScheduleVIEW™**, make appointments, find timeslots, setup templates and breaks.

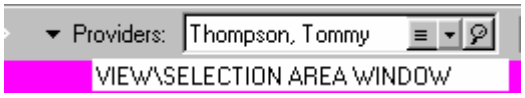
- **Reports** Lists all reports and report options.

- **Window** Allows switching back and forth between various windows.

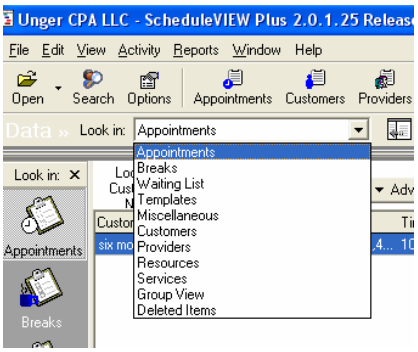
- **Help** For access to the help system, online support system and registration information.

➢ THE VIEW\SELECTION AND SHORTCUT BAR

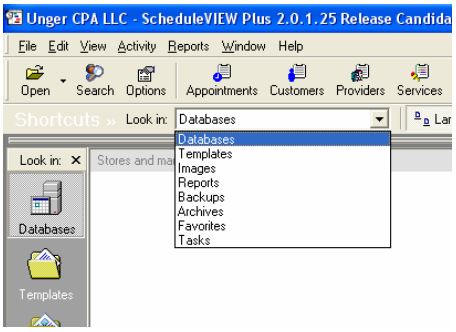
The **View\Selection Window** changes the data you are looking at in your window.



In **Calendar Views**, this allows you to easily switch between Groups, Providers, and Resources.



In **Data views**, the View\Selection Bar allows you to easily switch between the multiple types of data **ScheduleVIEW™** manages for you: Appointments, Breaks, Waiting Lists, Templates, Customers, Providers, Resources, Services, Group View, and Deleted Items.



In the **ShortCut views**, the View\Selection Bar allows you to easily move between databases, templates, images, reports, backups, archives, favorites and tasks.

The SHORTCUT BAR:

Make Appointment
Make Break
Find Slot
Find Next
Waiting Overlay
Schedule Waiting
100%
Shortcut Bar Shortcut Bar Shortcut Bar Shortcut Bar Shortcut Bar Shortcut Bar Shortcut Bar Shortcut Bar Shortcut Bar Shortcut

Click on **Make Appointment** to bring up the Add Appointment Window-- (HOWEVER, we recommend instead that you always double-click on an empty time slot to make an appointment so that you know that the time slot is available)

Click on Make Break to bring up the Add Break Window. (HOWEVER, we recommend instead that you always Right Click on an empty time slot, and choose Make Break so that you know that the time slot is available)

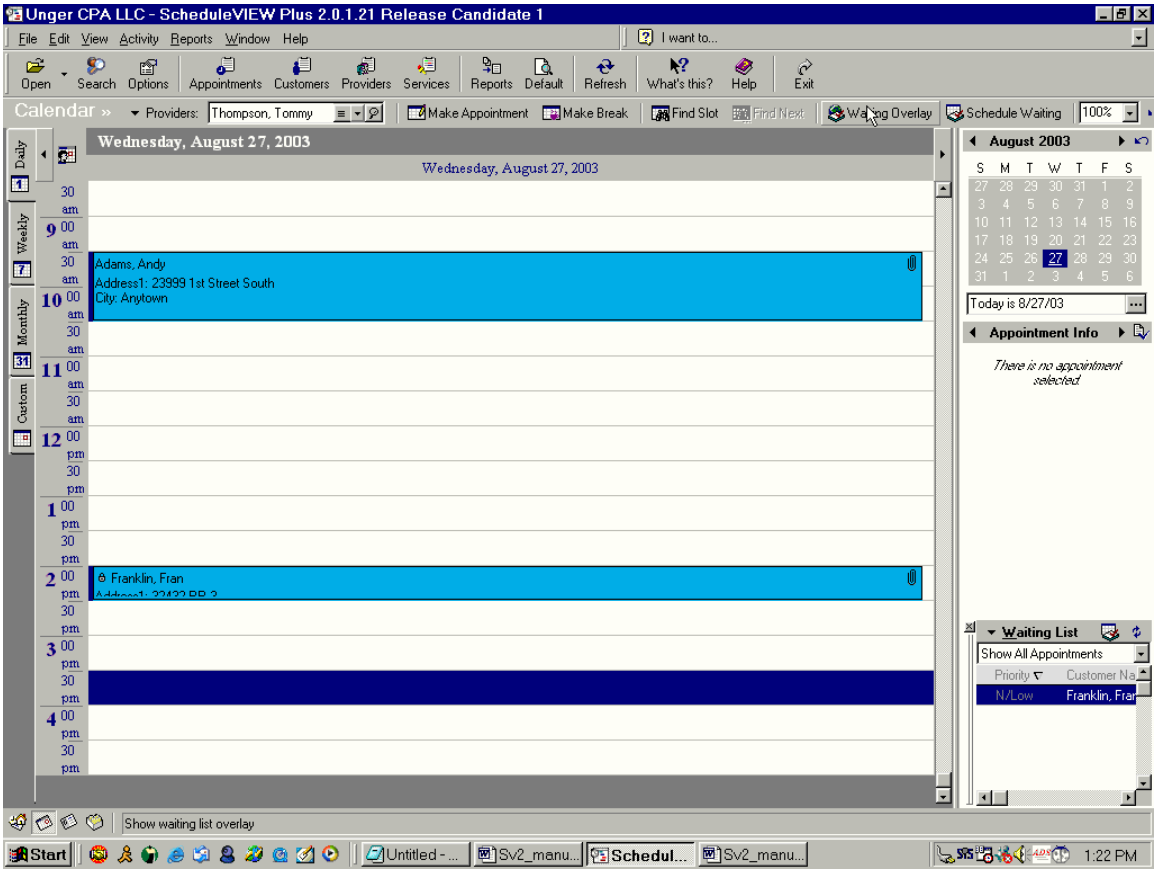
- Find Slot Click here to bring up the Find Open Timeslot window and search for the next available empty timeslot.

- Find Next Works in conjunction with the Find Open Timeslot, will continue to find the next available timeslot.

- Waiting Overlay This button will "Overlay" all items on the "Waiting List" onto your Schedule Grid so you can see potential scheduling conflicts.

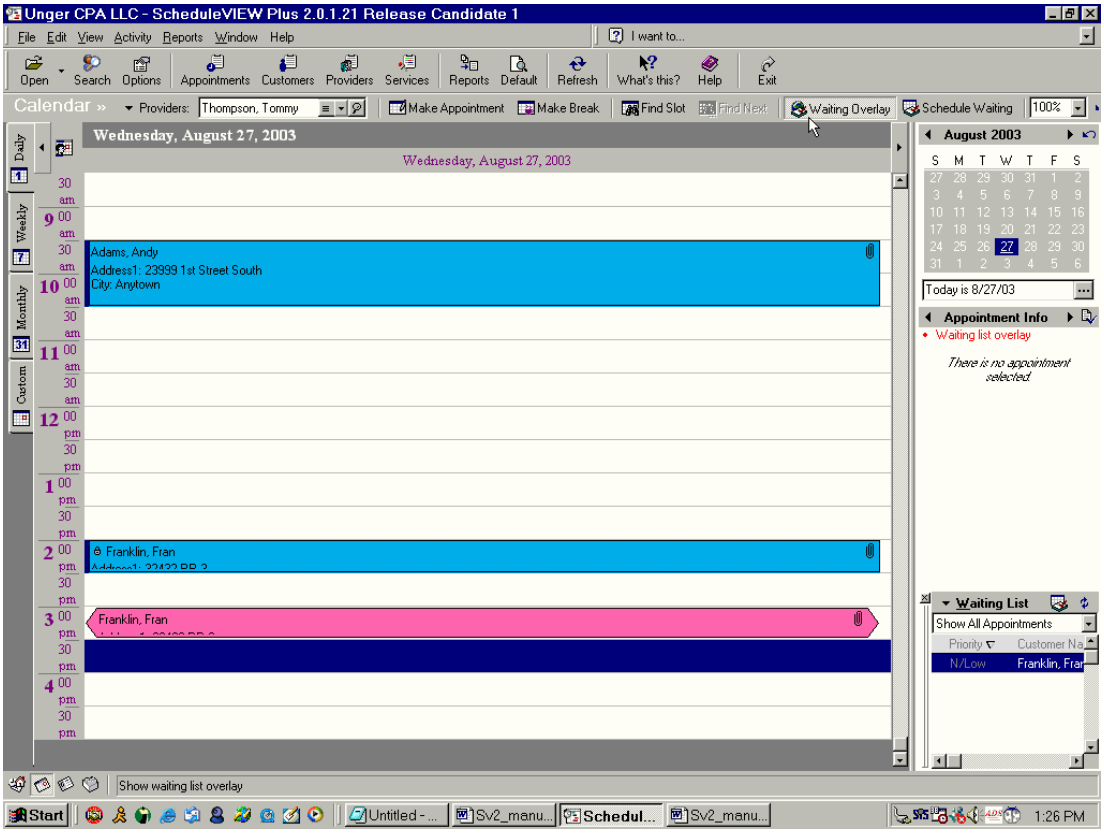
NOTE: It is our future intention of developing a WEB INTERFACE for ScheduleVIEW™ so that your customers\clients will be able to go to a web page and see available time slots for booking, and request an appointment via the web. You will then need to "Synchronize" the web page with your desktop ScheduleVIEW™ to receive these requests. When you receive them, they will be entered in the WAITING LIST. When this function becomes available, the WAITING OVERLAY and SCHEDULE WAITING buttons will be more functional and useful. If you have an interest in this feature list when this feature becomes available send us an email to webinterface@scheduleview.com with WEB INTERFACE NOTICATION in the Subject Line. If you're interested in beta testing, please send a message to the same email address above with an explanation of your interest.

This is what your screen might look like before pressing the "Waiting Overlay" button:



Notice that there is an item in the "Waiting List" window on the right hand side of the screen; when we click on the "Waiting List Overlay" button, that waiting list item happens to be scheduled to be waiting for a 3pm time slot-- however a lot of waiting list items will not have a date and time that they are waiting for, and if they do, they may be on a totally different day so you may have to go clicking on different days or weeks to see where they are.

In any event, here is what the screen looks like AFTER you click on Waiting List Overlay button:



The items in the "Waiting List" will always have "Pointed Ends" on them to indicate they are on the waiting list and not to be confused with regular appointments. Also, notice on the right hand side, under the Appointment Info window, there is a notice that you are in the "Waiting List Overlay" mode.

- Schedule Waiting Use this button to have ScheduleVIEW™ attempt to automatically make appointments from the waiting list, to the main scheduling screen for you. In order to make this happen, you MUST have entered in all the necessary parameters to make an appointment. For example, you MUST have specified a Customer name; a Provider that is in the database; and a Date and Time for the "waiting appointment". IF YOU OMIT ANY OF THESE ITEMS, ScheduleVIEW™ will not be able to schedule the appointment for you. You will need to EDIT the waiting list items and enter the necessary information in order to be able to have ScheduleVIEW™ attempt to schedule these waiting list items for you.

NOTE: It is our future intention of developing a WEB INTERFACE for ScheduleVIEW™ so that your customer/clients will be able to go to a web page and see available time slots for booking, and request an appointment via the web. You will then need to 'Synchronize' the web page with your desktop ScheduleVIEW™ to receive these requests. When you receive them, they will be entered in the WAITING LIST. When this function becomes available, the WAITING OVERLAY and SCHEDULE WAITING buttons will be more functional and useful. If you have an interest in this feature, please email us a request to be put on a notification list. Send an email to webinterfac@scheduleview.com with WEB INTERFACE NOTIFICATION in the Subject Line.

➢ THE SCHEDULEVIEW™ TOOLBAR

The **ScheduleVIEW™** Toolbar allows you to easily move back and forth between the most important functions of **ScheduleVIEW™.** By default, it rests on the same portion of the **ScheduleVIEW™** View Bar, but you can move it to anyplace you want by simply holding the mouse down on the bar and moving it.

The **ScheduleVIEW™** Toolbar has sixteen menu functions. If a menu function appears as light gray on the bar it is currently unavailable for use. The sixteen menu functions from left to right are:

- Open an Existing Database Click here to open a database.
- Search Brings up the Search window to search the data in **ScheduleVIEW™**'s database.
- Options Brings up the ScheduleVIEW™ Options window.
- Appointments Brings up the **Appointment List Window** and allows you to view the current appointments, or by clicking on Advanced Options button allows you to view all future appointments as well. Great if someone calls and asks "When is my next Appointment? I forgot." Go to this window and click Advanced Options, choose From Today Forward, and then also click on the FILTER button options there, then type in the name of the customer and you'll see all their future appointments. (You may also click on 'Edit' 'Customers' and double-click on the customer you wish to view. Then click on the 'Show Appts' button on the left of the customer information. and choose your date range.)
- Customers Brings up the **Customer List Window** and allows for the creation of a new Customer or the edit and delete of existing Customers.
- Providers Brings up the **Provider List Window** and allows for the creation of a new Provider or the edit and delete of existing Providers.
- Services Brings up the **Service Code List Window** and allows for the creation of a new Service Codes or the edit and delete of existing Service Codes.
- Reports Brings up the **Report List Window** and allows selection of reports.
- Default Instantly brings up a window with a preview of the print default report. Note – you can set up which report comes up here as by selecting it in your **Reports List Window**.
- Refresh Updates all your data from the database – particularly useful in multi-user environments.
- Help Brings you into the **ScheduleVIEW™** Help System.
- Exit Exits **ScheduleVIEW™** and closes its databases.

➢ THE OUTLOOK BAR

The **Outlook Bar** appears on the right hand side of the **ScheduleVIEW™** window in some views. You can make it appear and disappear by clicking on **View** in the **Main Menu**, then **Home**, then **Outlook**.

The **Outlook Bar** contains buttons which allow you to easily navigate between the most important functions of **ScheduleVIEW™.** These are:

Today Displays the Today View.

Calendar Displays the Calendar Views.

Data Displays the Data Views.

Shortcuts Displays a list of shortcuts to data, tasks, favorites, archives and backups.

Support Brings up the Support System with various options for **ScheduleVIEW™** support, including the **Troubleshooter Wizard**.

Tips Brings up the list of helpful tips to using the **ScheduleVIEW™** system.

IMPORTANT BUTTONS AND ICONS

There are a number of important buttons used consistently throughout the **ScheduleVIEW™** system that provide additional functions and usability. They are as follows:

Select from List Brings up a list from the database to select from. For example, if you were making an appointment and were in the CUSTOMER field, then clicking this button would show you the list of customers, starting at the letter A in the alphabet.

Search Brings up a search window and allows searching in the database with various parameters.

Provider Icon – Brings up a list of Providers.

Resource Icon - – Brings up a list of Resources.

Group Icon - – Brings up a list of Groups.

QUICK KEYS

Quick Keys

F5 is used to "Add" records
F8 is used to "Edit" highlighted or selected records
Ctrl + T is used to "Jump to today's" calendar
Ctrl + J is used to "Jump forward" to a future date
Ctrl + F is used to "Find an open time slot"

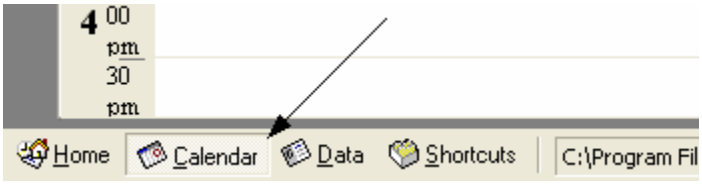
ScheduleVIEW™ has a number of short-cut keys that move you quickly through the application. Here is a summary of our Quick Keys.

SETTING AN APPOINTMENT WITH ScheduleVIEW™

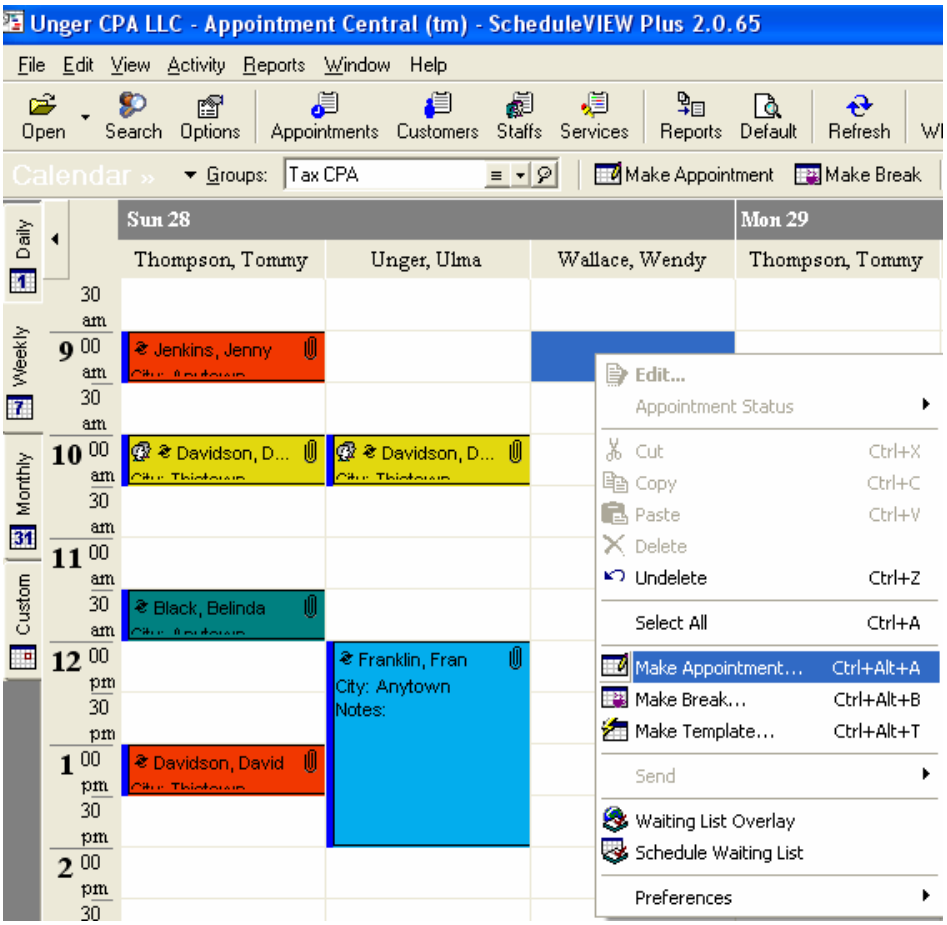
1

Select the Appointment Time

Open **ScheduleVIEW™** and click on the Calendar Icon on the Outlook Bar if it is not already displayed in the window. . Or click on the Calendar icon in the bottom left hand corner of the screen, right above the Windows Start button:



This opens your **Main Appointment Window.**



To make an appointment:

A. Double click on an open time slot -or-

B. Right click on any time slot and choose 'make appointment' to book an appointment. (If you are double- or triple-booking, you will need to use this method)

2 Enter the Customer's Name

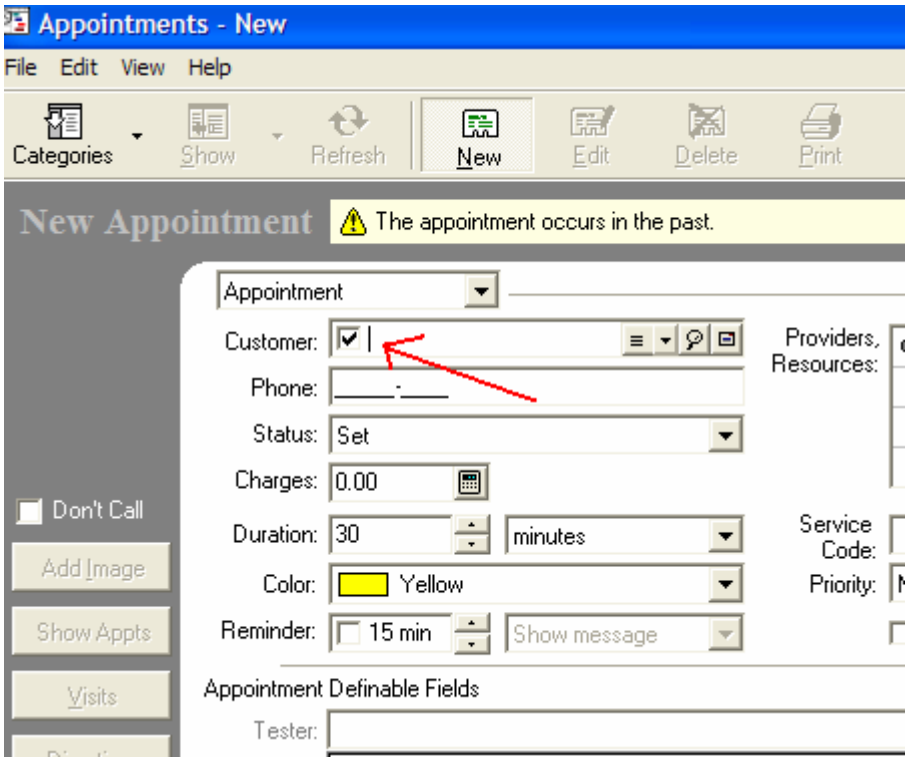
On the **New Appointment** form, simply type in the customer's name in the Customer field. **Please note - if you have the Plus version, you may have changed the term to 'Client' or 'Patient', etc.**

The Main Appointment Window shows you all the day's appointments broken down into time slots.

On the TOP right side is a scrollable "Month at a Glance" calendar allowing you to change the day you are viewing simply by clicking on a day in the monthly calendar. You can also click on the Right or Left arrows to scroll thru by month, and click on the "return arrow" to return to Today's Date.

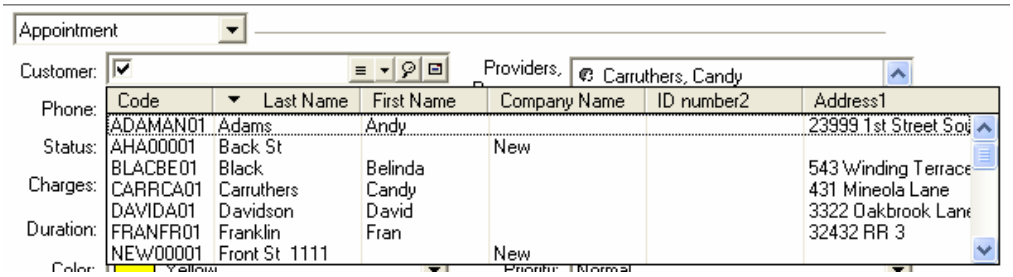
Beneath the Monthly calendar is the "Appointment Info Pane". Highlight an appointment on the Schedule Grid and information about that appointment will appear in the Appointment Info window.

At the bottom of the window is a "Waiting List" of appointment to be scheduled.



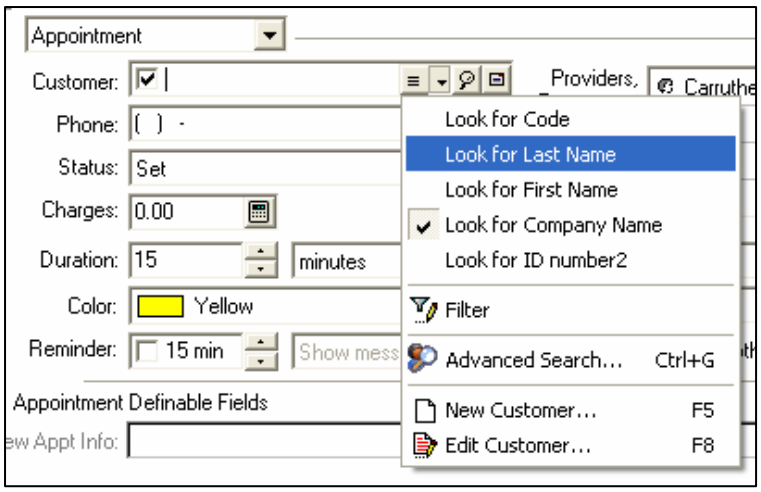
A ☑ next to the name indicates that you want to use a name in the customer database. If you uncheck this box you are indicating that you do not wish to place this customer into the database or select an existing customer; it means that you just want to "write in" this customer and not keep track of them in the database. This is great for 1 time only appointments.

To select a customer name from the database, click on the ≡ button. A list of all the customers in the database will appear.



If you type the first letters of the customer's last name and press the ≡ button, you will reach that alphabetical position in the customer database.

Just click your customer's name and information on that customer will auto-fill in on the **New Appointment Form.**



***HINT** - **If your customer does not auto-fill and leaves the field blank: Check that your choice is 'Search for Last Name' If you have it set as 'Look for Company Name' and there is no company name in the customers information, then the field will be blank because it will have no data to use.**

(If you don't want to add to the customer database, you can just type the in the name, and press Enter or Tab to go to the next field. When you do this, the program recognizes that you are not adding this customer to the database and the checkmark to the left of the name will disappear, meaning that this is not a customer in the database. This is useful if you are scheduling an appointment with a sales rep, or someone that you won't be scheduling frequently.)

To edit a customer's information in the database, press the drop down arrow button and select **Edit Customer**, or Press the **F8** key

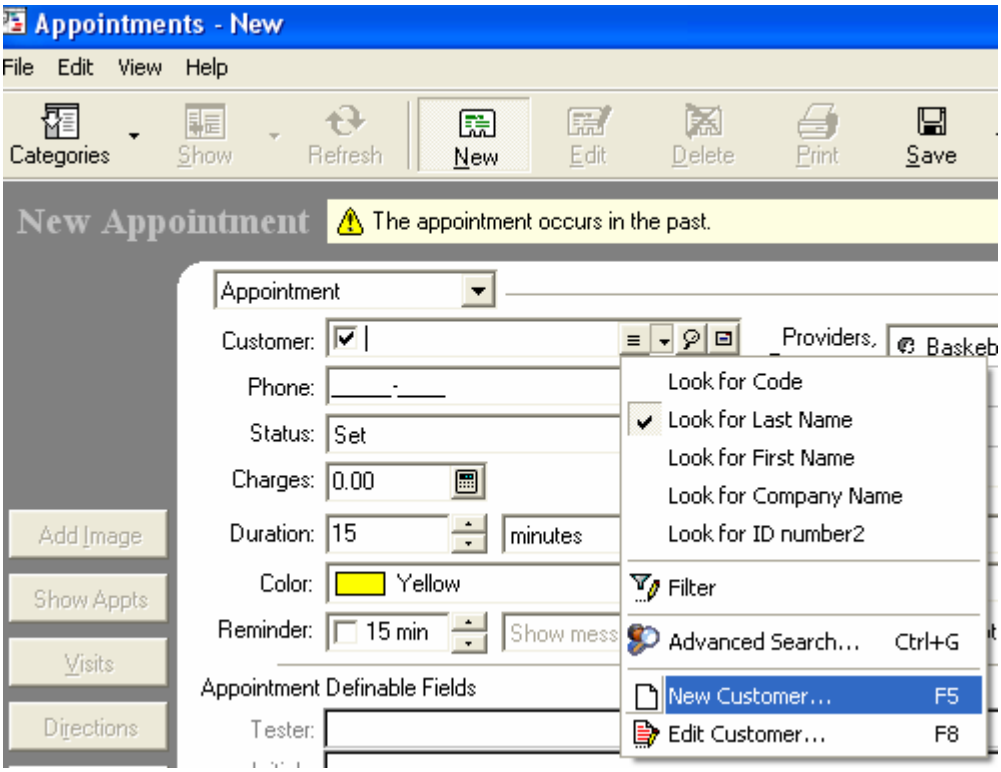
Pressing the magnifying glass icon will bring up a search menu to search for customer names in the database.

Pressing the envelope icon will allow you to directly email the customer, provided you have set up **ScheduleVIEW™** for email access and provided that you've entered a valid email address for the customer.

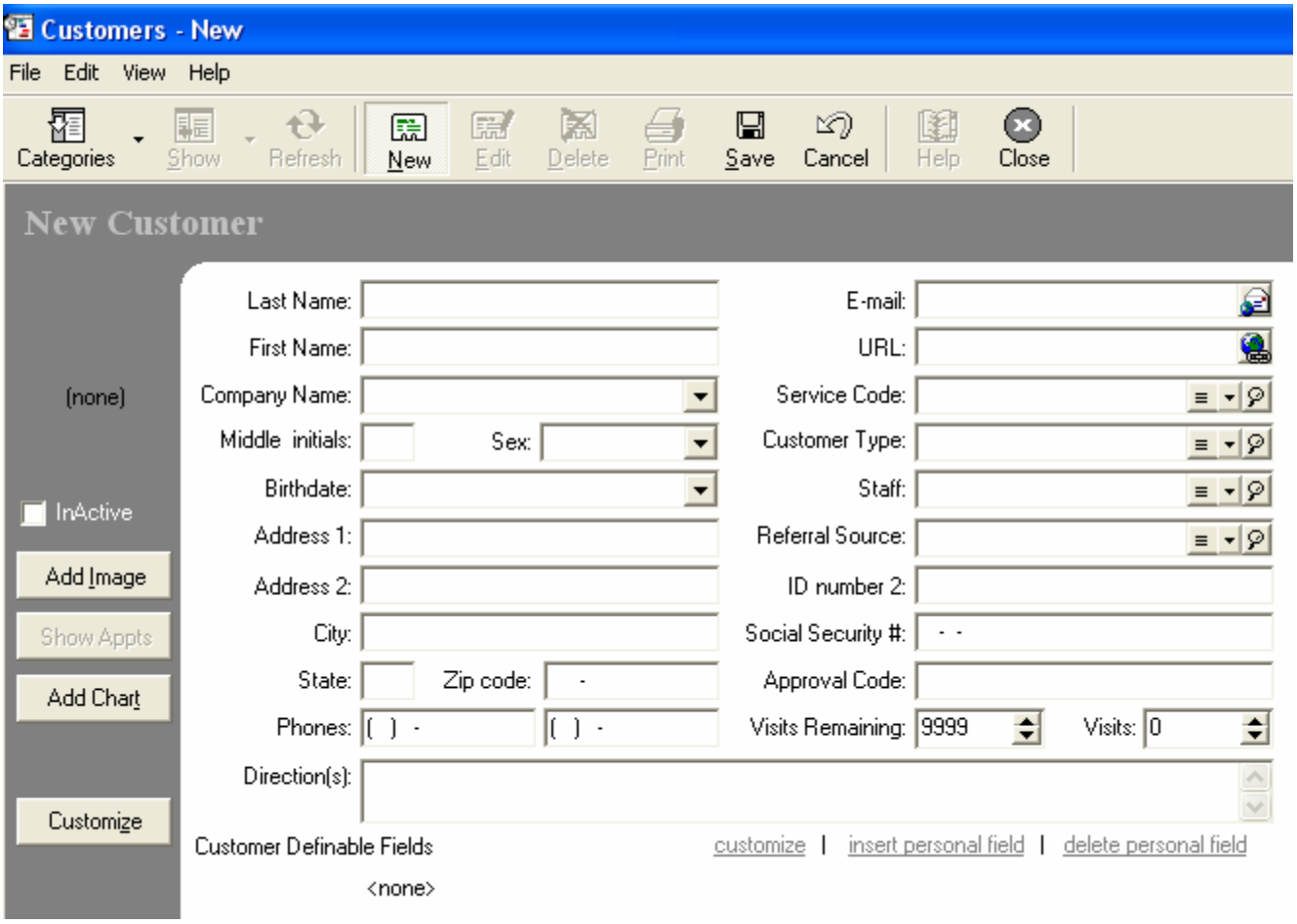
To edit an existing customer's information, just press the F8 key. To select other options to view, press ↓ button.

To add a new client to your database:

Click the drop down arrow and choose **New Customer**
or press the **F5** Key on your keyboard to go to the screen which adds the customer to the database.

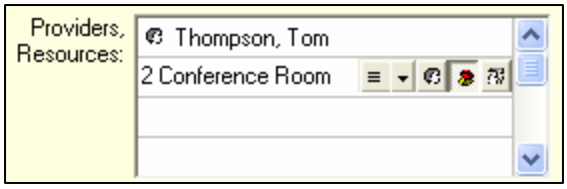


Fill in all the new customer information and click the 'Save' icon.



This will take you back to the new appointment screen to finish setting the appointment.

3 *Enter Who The Appointment Is With and What They Need.*



Next, select who the appointment is with by clicking on the white box that says **PROVIDERS/RESOURCES**. The program will default to the currently displayed provider. You may schedule for more than 1 provider or resource when making an appointment.

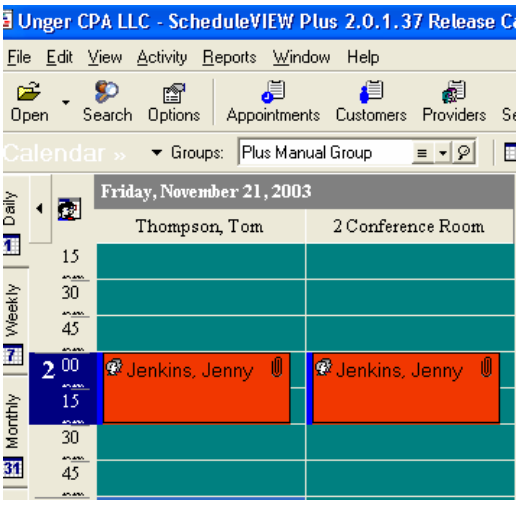
Press this icon to select from the Provider List.

Press this icon to select Resources needed, such as treatment or service rooms, equipment, or trucks.

Press this icon to select a Group from the Group List.

For this example the Customer - Jenny Jenkins is going to meet Provider - Tom Thompson in the Resource - Conference Room 2. When the appointment is saved it will be in both columns.

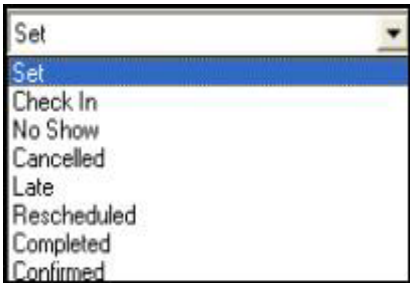
This allows you to see when your Resource - Conference Room is available.



4 *Enter The Appointment Information (OPTIONAL)*

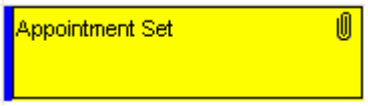
Now enter some other important information about this appointment.

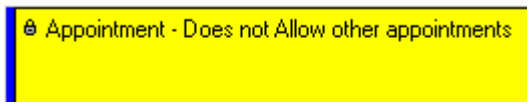
Status:



Start by selecting a Status by pressing the ▼ button and highlighting **Set.** (As appointments status' change during the day – the customer confirms, arrives, completes, cancels, reschedules, calls in late, or doesn't show; right click on the appointment from the main schedule grid to change the status. This allows you to keep track of your appointments and will be critical in reporting later on.)

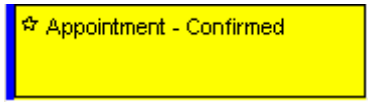
ICON IDENTIFICATION

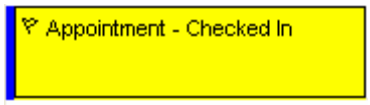


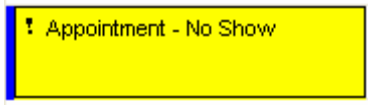


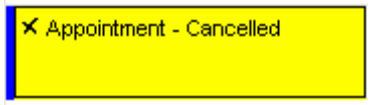
Each time you schedule an appointment it will have an icon to identify it's status

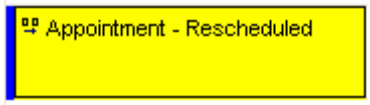
At left is each icon and it's meaning.

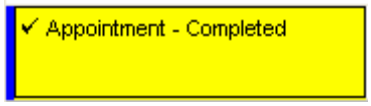


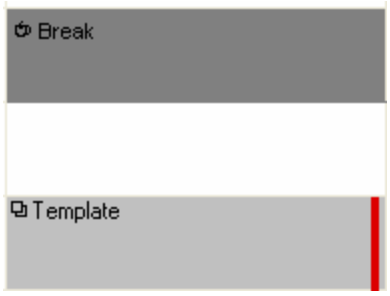












Appointment Duration:

Enter the appointment duration in hours, minutes, days or as an all-day event.

Charges:

You can enter the charges for the appointment here. Pressing on the calculator button brings up your **Windows calculator**.

Service Code:

Next select a service code from your list of service codes. Selecting a service code will automatically fill in default values for appointment duration, color, priority, and allowing other appointments.

You can set up new service codes with an easy-to-understand description by pressing the **F5 key** while the cursor is in the "Service Code" field or box.. You can edit service codes and descriptions by pressing the **F8** key.

Press the **Details** key to see additional information about for this appointment.

ALLOWING OTHER APPTS (OR PREVENTING DOUBLE-BOOKING)

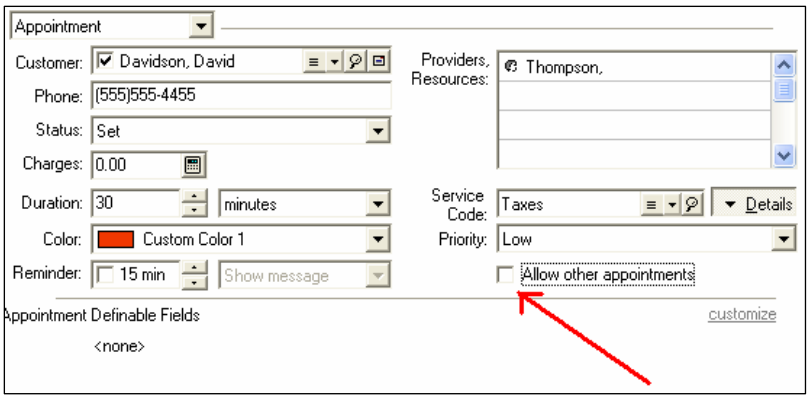
Select priority and decide if other appointments can be allowed with this one by placing a ☑ next to **allow other appointments**. *Please note: Checking this box **will allow** double booking to occur.*

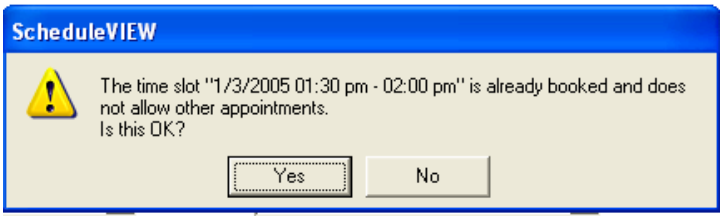
ScheduleVIEW™ PLUS: If you want to have a pop-up warning when an appointment cel is already booked, to prevent double-booking:

Click on 'File' 'Options' 'Customize' 'Calendar' 'Rules'

Click the + next to 'Occupied Time slots', you may check or uncheck 'Allow Other Appointments'

Now when you make an appointment the 'Allow other appointments' box should be blank. (This box only shows in the PLUS version of ScheduleVIEW™)




ScheduleVIEW
The time slot "1/3/2005 01:30 pm - 02:00 pm" is already booked and does not allow other appointments.
Is this OK?
Yes
No

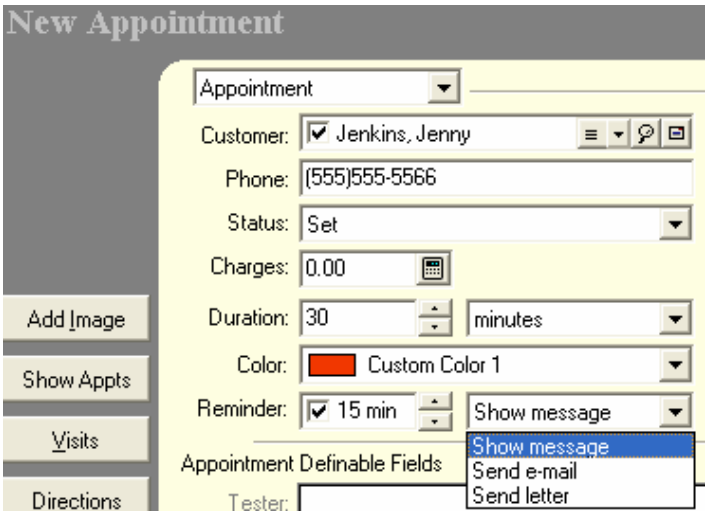
Now when you try to double-book an appointment you will get a pop-up warning:

You may want to permanently disable double-booking for specific Users in security. To do this, see section on 'Permissions' in this manual.

Color Appointment:

If you like, you can use a color code for the appointment so that you can see at a glance of your calendar the types of appointments you have scheduled for the day. This will default to the color code set up for the service code.

POP-UP REMINDERS:



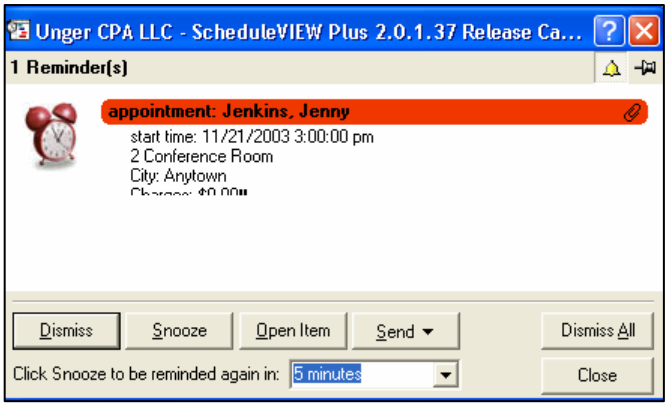
THIS IS A ScheduleVIEW™ PLUS ONLY FEATURE.

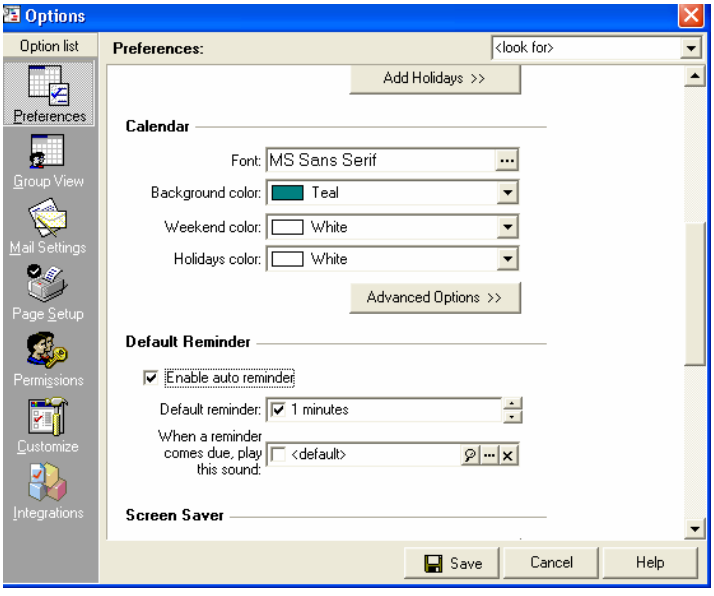
Set up a Popup Message (Appointment) Reminder, Email reminder or Letter reminder here.

Enter a ☑ and then select the time. In this example, the reminder will pop up or be sent 15 minutes before the appointment.

Now press the ▼ button to choose what you want to do at the reminder time: Show Message, Send Email, or send Letter.

This is a sample of the Pop-up. You can choose when you want to be reminded again and click 'Snooze' to have the message pop up over again. 'Send' will allow you to email a reminder.





NOTE: Auto Reminders must be enabled for Pop-ups to work.

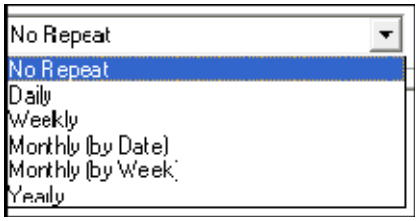
Click on 'File' 'Options' 'Customize'

Scroll down and put a checkmark next to 'Enable Auto Reminder'

Whatever you choose for 'Default Reminder' will default into your New Appointment window so you do not have to enter a time period each time you make an appointment.

Start and End Time:

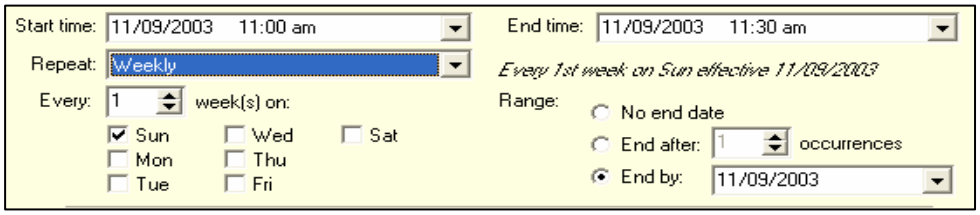
If you've already selected the time period for the appointment, the Start and End Times will appear here. To change the date, simply press the ▼ button and select another date from the drop-down calendar. To change the time, highlight and type over.



Repeat (Optional):

Why spend your time entering repetitive appointments? **ScheduleVIEW™** does it automatically for you! Just select how frequently this appointment should be repeated.

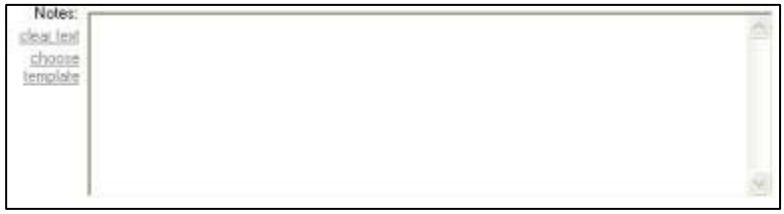
ScheduleVIEW™ will prompt you to set the parameters for the repeating appointments.



ScheduleVIEW™ will automatically create all the repeating appointments for you when you save this appointment!

Notes:

Notes about this customer will show up here if they have been entered into previously in the customer database. Or, you can use this area to jot down special notes about this appointment with this customer. Or select a template (A pre-written set of notes) to paste in here.



5 *Save The Appointment!*

Simply press the Save button if you're finished and ready to save this appointment.

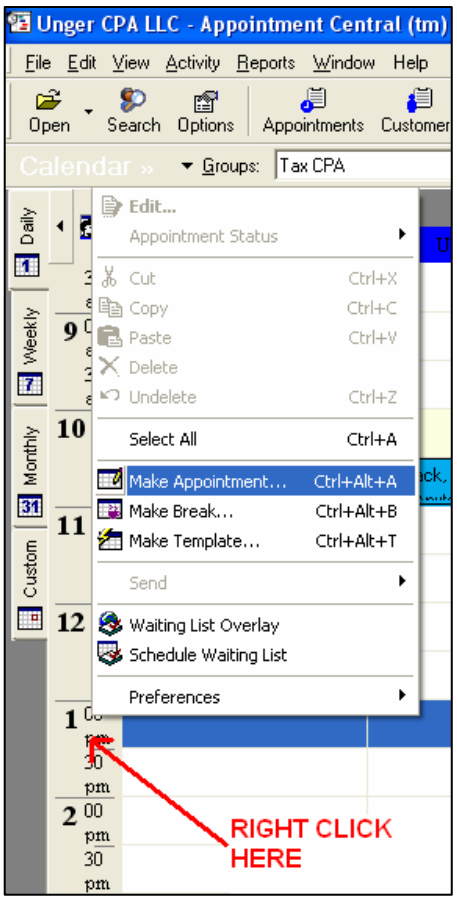
It's as simple as that! Your appointment has been set!

Here's another way to do it!

Just press the **Ctrl + S** at any time to save your appointment.

Press the Cancel button, if you don't want to save the appointment and wish to start over.

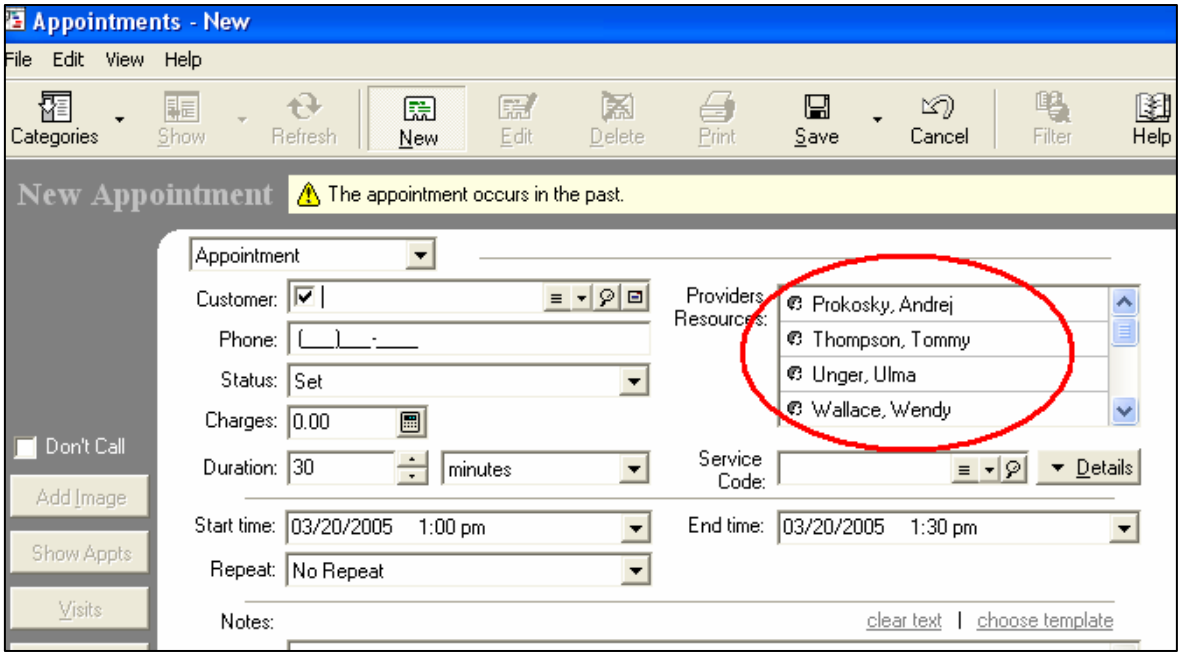
If you want to make a break or appointment for all the Providers and/or Resources on your calendar screen:



While in the 'Group' view of your calendar screen:

Right click on the time bar at the left of your screen and choose 'Make Appointment:

Now your 'New Appointment' screen will have all the Providers/Resources auto-filled in for you so you don't have to manually add each one.



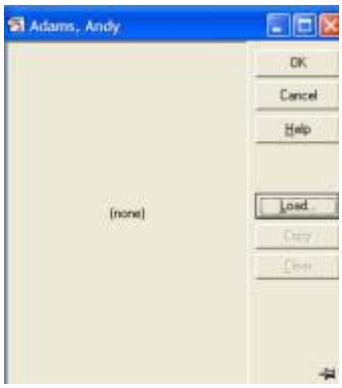
Fill in your appointment information as usual and save.

OTHER HELPS AND HINTS WHEN SETTING APPOINTMENTS

Display more information about your customer

ScheduleVIEW™'s friendly design allows you to find out more information about your customer without ever leaving the appointment-setting window!

Simply click on these additional buttons on the New Appointment Window for more information!



See a graphic or picture associated with this customer. Be creative! This could be a picture of the customer, or their equipment or even their last haircut!

Press the **Load** button to pick a graphic for this customer.

Press the **OK** button to save.

Press the **Cancel** button to cancel.

Press the **Help** button for Help

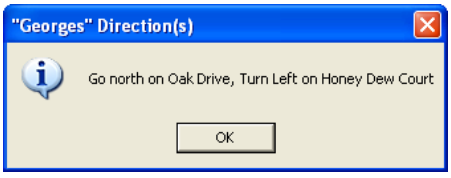
Press the **Copy** button to copy from the Windows Clipboard.

Press the **Clear** button to delete the image from this customer.

If there is *already an image* associated with this customer, this button will say **Show Image**. Press the button to change, copy or clear.

This gives you a complete history of your relationship with this Customer, including past and future appointments! If you leave the checkboxes blank on the date range selection when you click this button, ALL appointments will be displayed. If you only enter a beginning date, and leave the ending date unchecked, then all FUTURE appointments will show.

If you are using "authorized visits", this button will show you the "authorized visits" used and remaining for this customer. These fields get automatically updated when setting an appointment status to complete.

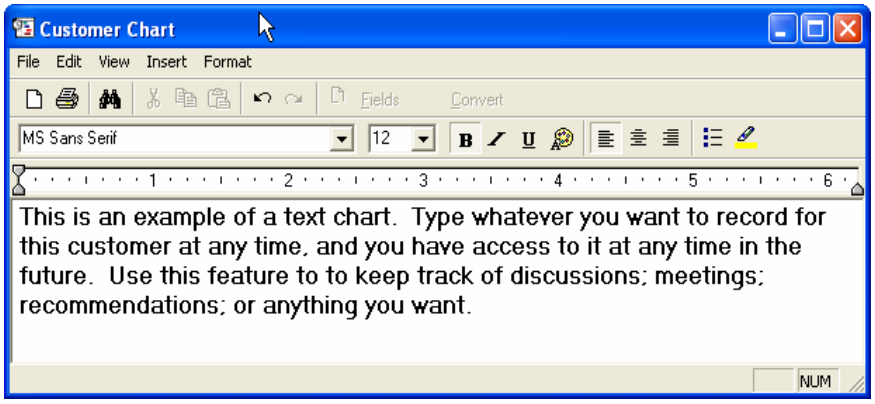


Click on this button and a window will popup giving directions to the customer's site.

Or be creative and use this field to highlight a customer's **hot topics**, preferences, or even equipment serial numbers! Some people even put insurance policy information in this field!

Add Chart

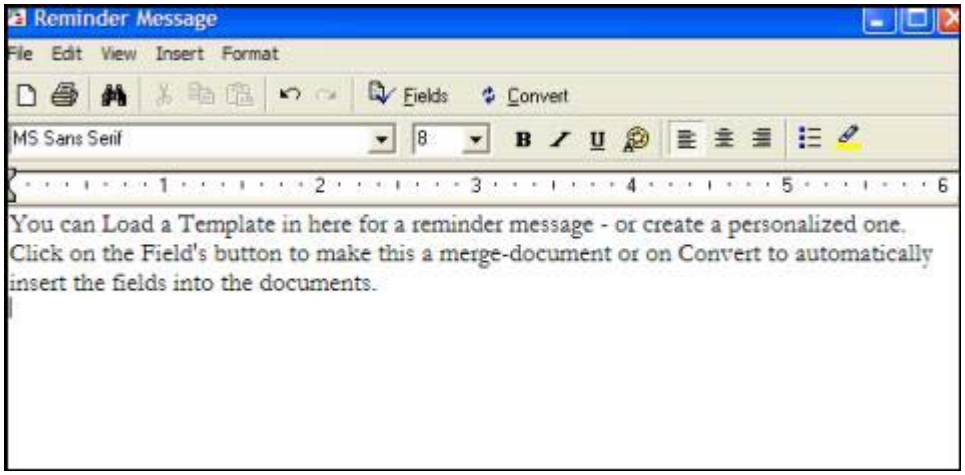
Click on this button to instantly add a text or **ScheduleVIEW™ Rich Text Format** (RTF) file for this customer.


Customer Chart
File Edit View Insert Format
Fields Convert
MS Sans Serif
12
This is an example of a text chart. Type whatever you want to record for this customer at any time, and you have access to it at any time in the future. Use this feature to to keep track of discussions; meetings; recommendations; or anything you want.
NUM

You decide what file is important and **ScheduleVIEW™** will put it immediately at your fingertips!

If there is already a file associated with this customer, **View Chart** will appear on this button instead.

Message


Reminder Message
File Edit View Insert Format
Fields Convert
MS Sans Serif
8
You can Load a Template in here for a reminder message - or create a personalized one. Click on the Field's button to make this a merge-document or on Convert to automatically insert the fields into the documents.

Click on this button to bring up a word processing document and create a reminder message for this customer.

.

Add Invoice

PLUS

This feature is only available if you have **ScheduleVIEW™ Plus and QuickBooks Pro or Premier,** 2002 or newer installed. Have **QuickBooks** open. Click on this button to automatically open up the invoicing process in **QuickBooks** and transfer the data from **ScheduleVIEW™** to **QuickBooks**. It's that simple!

MAKING LABELS WITH DYMO® LABELWRITER

Now, easily print appointment reminders labels, address or mailing labels, or any other kind of labels for your customers or appointments. ScheduleVIEW™ allows you to setup or format two labels; we call one an 'Appointment Label' and the other a 'Customer Label'.

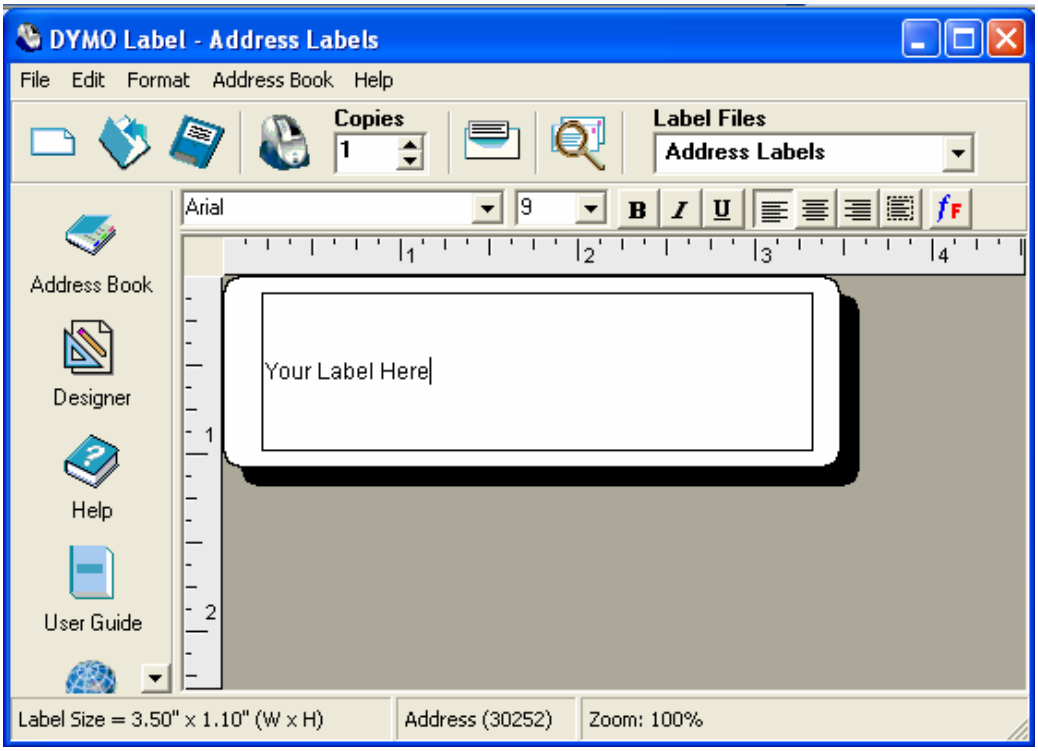
This feature allows you then to click on one of these label buttons when editing an appointment, and then print that label. You can also click on the customer label button when editing a customer to print an address or mailing label. You can format the labels any way you want; for example a medical office could use one of the labels for printing chart labels.

You can purchase a Dymo Label printer model 330 at most office supply stores such as Office Depot; Office Max; or Staples for around $99. For a better and faster printer, you can also purchase the Dymo Turbo 330 at WWW.LABELCITY.COM for around $99.

There are a couple labels that we really like for printing appointment reminders. One is the "REMOVEABLE" labels at www.labelcity.com . These labels are like the yellow sticky notes and can be removed and reapplied on a calendar—great for your customers. The other label we really like is the "Appointment Labels" Dymo part # 30374. The really nice feature of this label is that it is non-adhesive, like a business card. This label\card can be used to print the customer's next appointment information.
Recommendations\Requirements: **We recommend and support only the Dymo 330 and 330 Turbo models. You MUST have the Dymo label printer software installed on your computer in order for our software to interface with the Dymo Printer.**

YOU MUST HAVE SCHEDULEVIEW™ STANDARD OR PLUS TO BE ABLE TO PRINT A DYMO® LABEL

You can print a single address label, or an information label using your Dymo® LabelWriter:

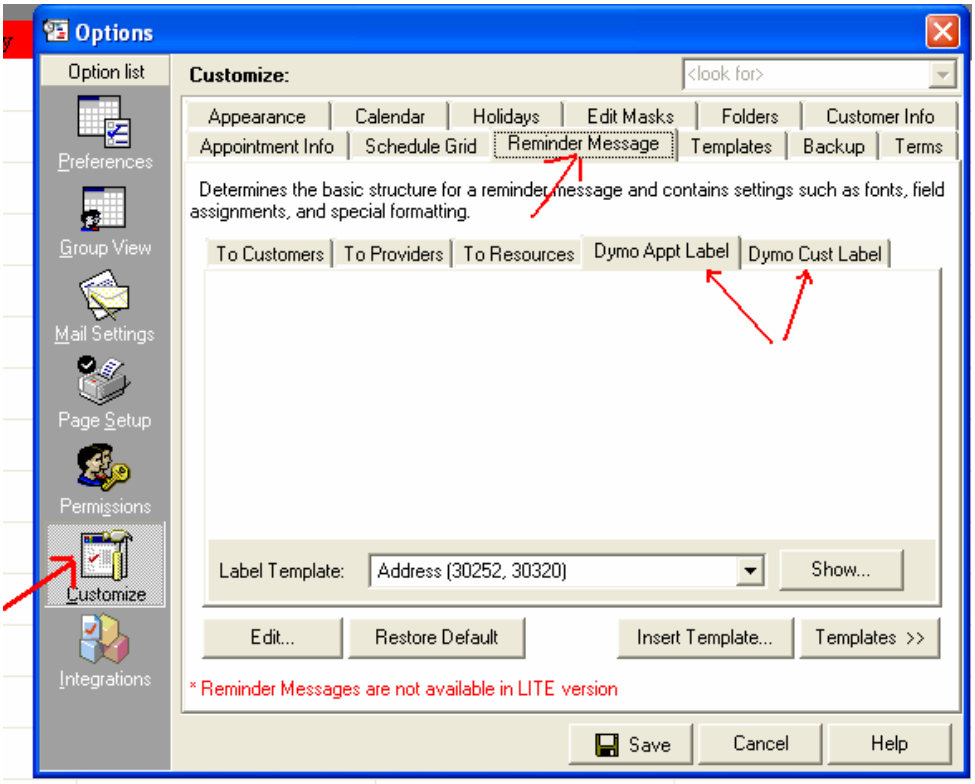


You must have the DYMO® LabelWriter installed on your computer to use this ScheduleVIEW™ function.

We recommend and support only the Dymo 330 and 330 Turbo models.

Load the correct label size.

Open ScheduleVIEW™ to your calendar and Click on 'File' ; 'Options' ;

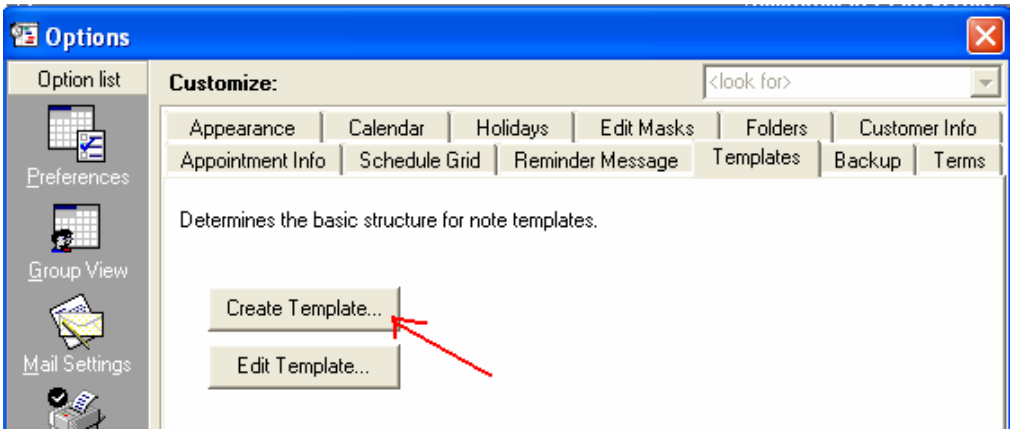


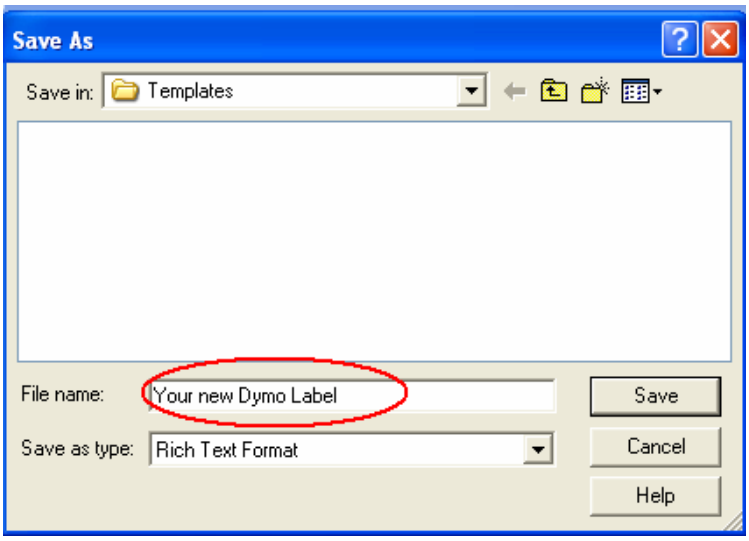
'Customize';
'Reminder Messages';
and then
'Dymo Appt Label'
-- or --
'Dymo Cust Label'

(For this example we have used Dymo Appt Label)

Click on 'Templates >>'

Click on 'Create Template'



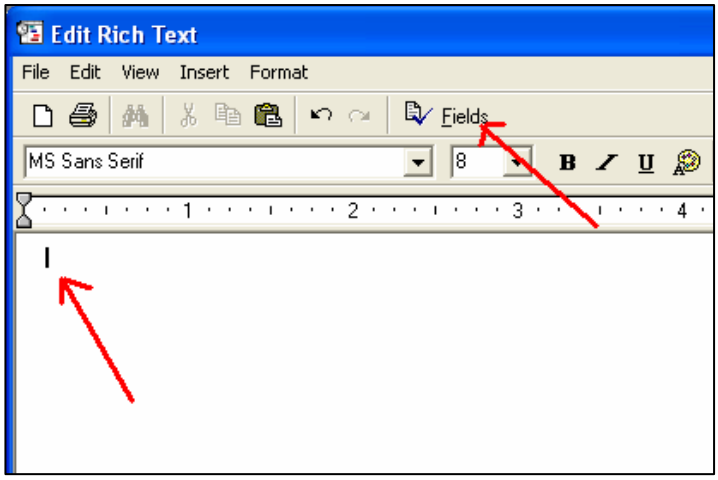


Type in a name for your new label and 'Save'

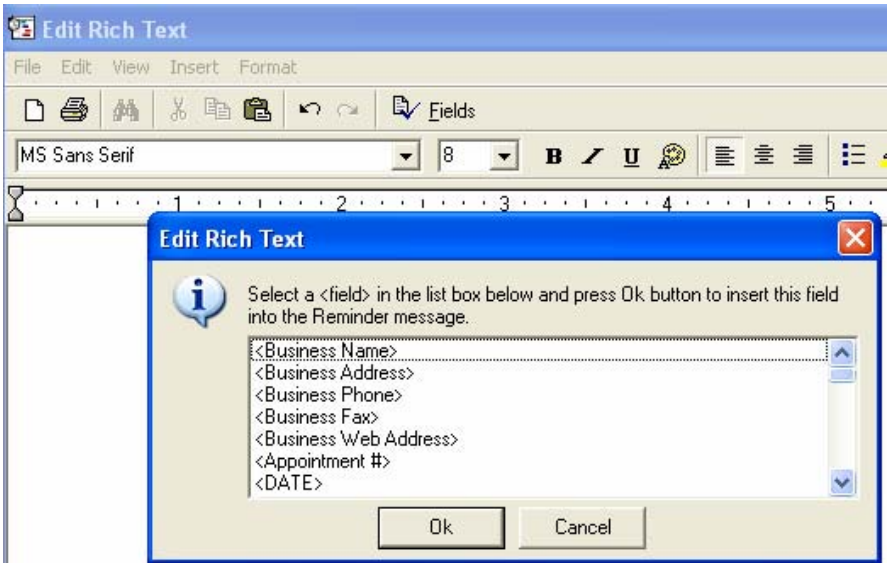
This takes you to 'Edit Rich Text'

In order to add information from customer database or appointment screen move your cursor on the screen in the location you wish the information to insert.

Click on 'Fields' icon which is located on the menu bar.



the

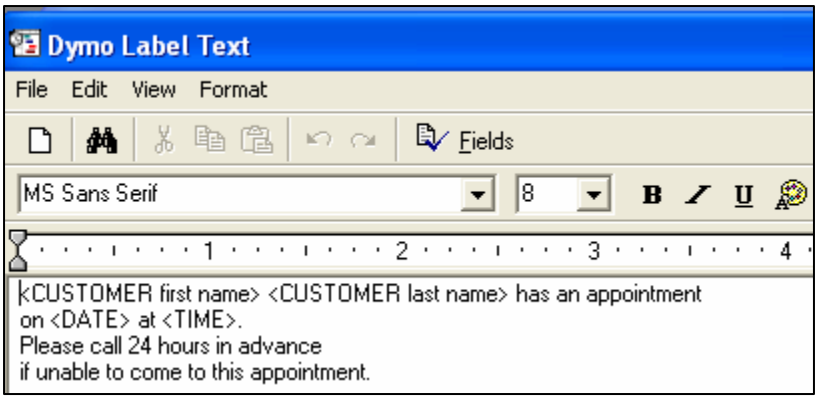


This gives you a drop-down list of fields you may merge customer or appointment information from.

Highlight your choice and click 'OK' and the field will insert.

Repeat this for all the fields you wish.

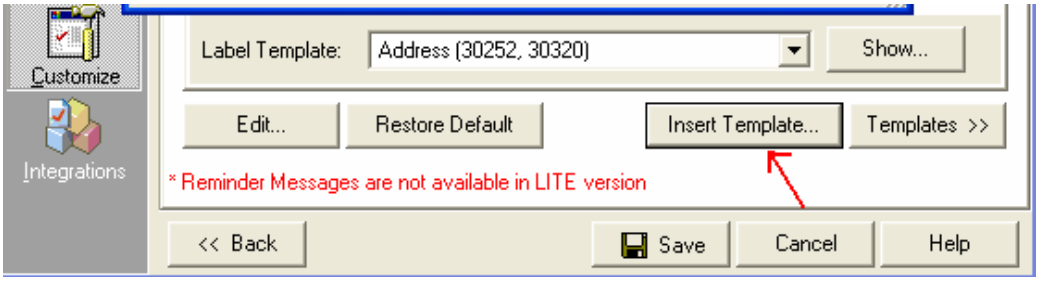
Make sure you have a space on each side of the **brackets < >, and the text, to format properly.**

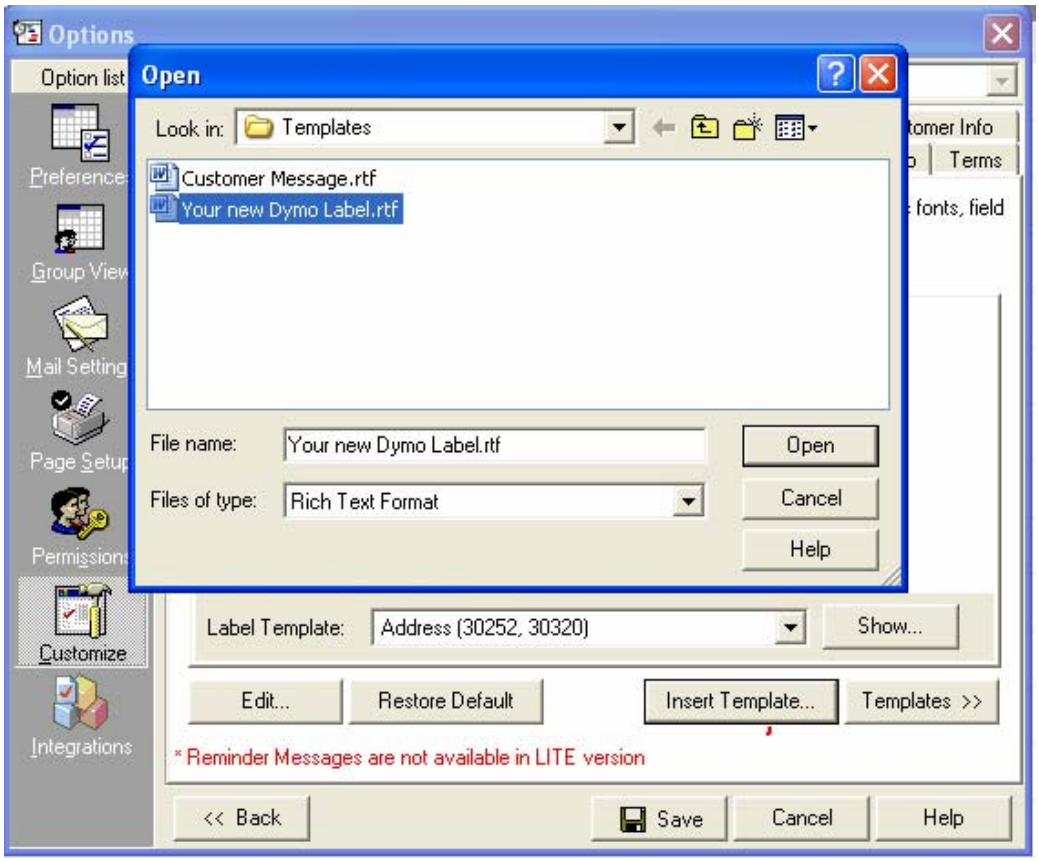


Here is an example of an appointment reminder:

When you are finished
Click 'File'
'Save and Exit'

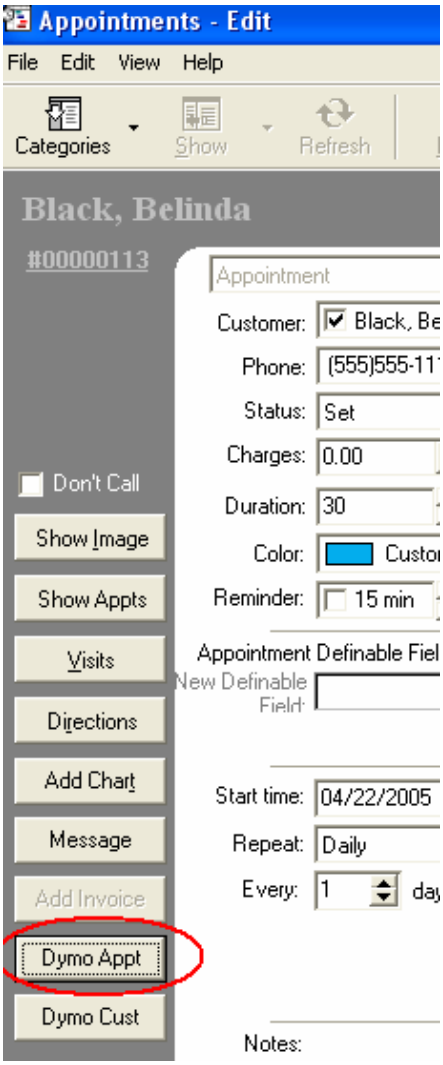
Click 'Insert Template'





Choose your new template and 'open'

Now click 'Save'



When your customer is ready to leave you can now print up an appointment reminder sticker and hand it to them.

To do this, Edit their appointment and

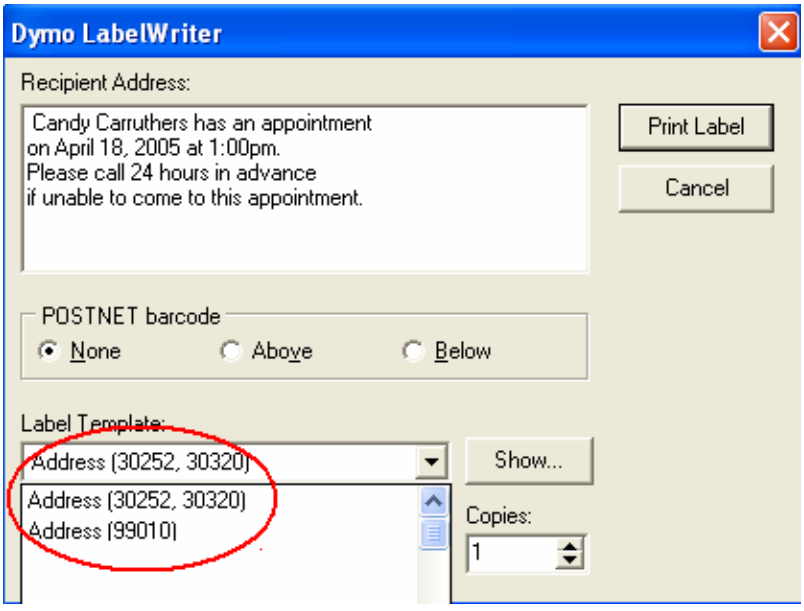
Click on the 'Dymo Appt' icon

You will get a preview of the label:

Make sure you have chosen the correct 'Label Template' for your Dymo® LabelWriter.

Please note, this is not a ScheduleVIEW™ setting, it is a Dymo® LabelWriter setting and depends upon the label size you have loaded into your printer

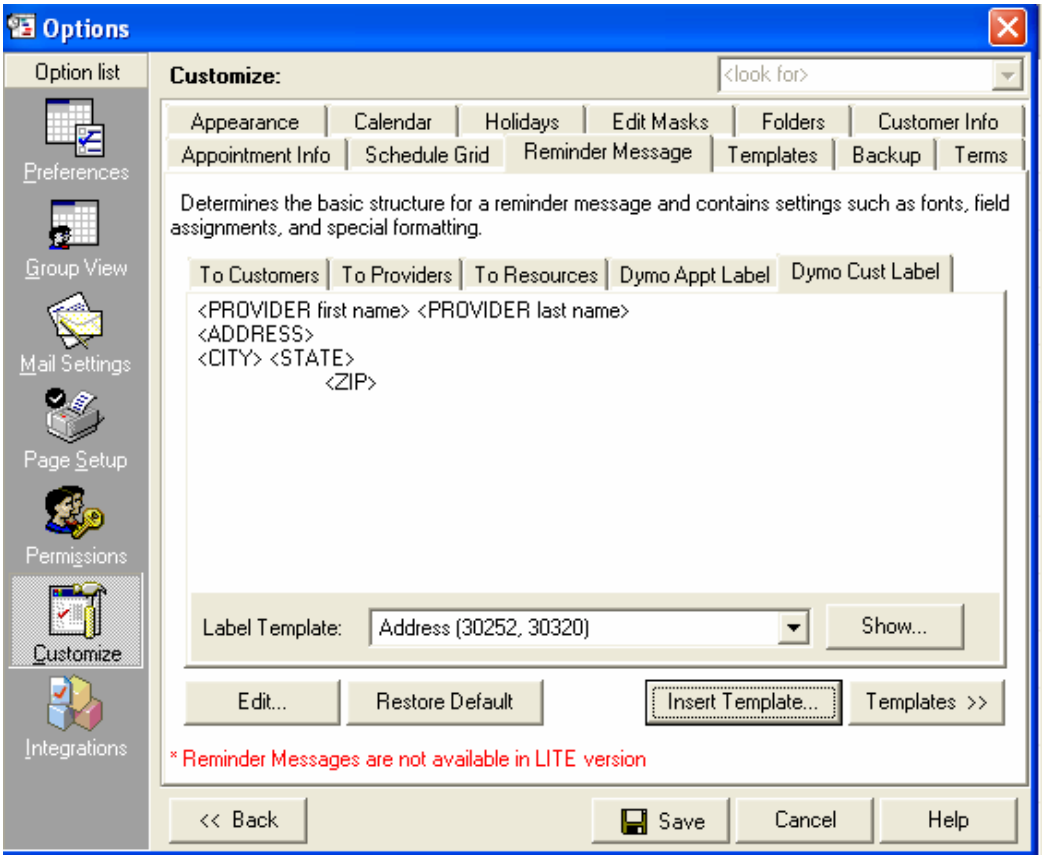
Click 'Print Label' to print



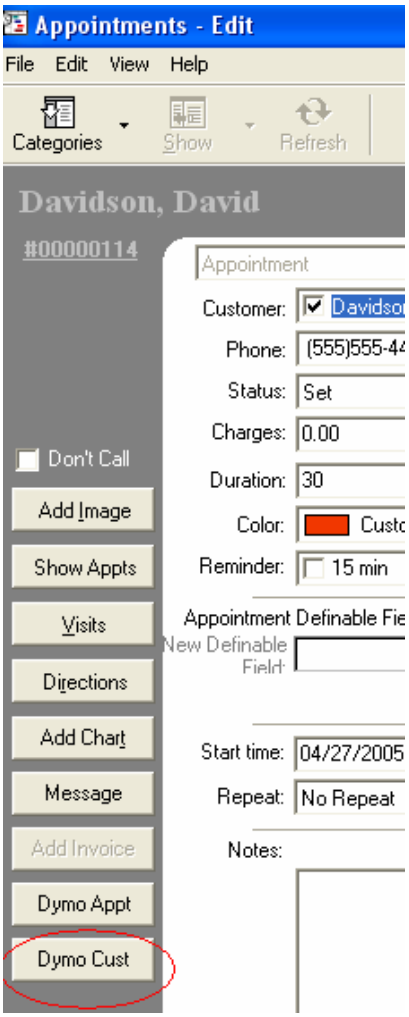
Dymo® LabelWriter software uses shrink to fit technology. We recommend formatting your label with short widths and multiple lines so they are more legible:

Belinda Black has an appointment on April 22, 2005 at 9:30am. Please call 24 hours in advance if unable to come to this appointment.	Belinda Black has an appointment on April 22, 2005 at 9:30am. Please call 24 hours in advance if unable to come to this appointment.

Dymo Cust Label

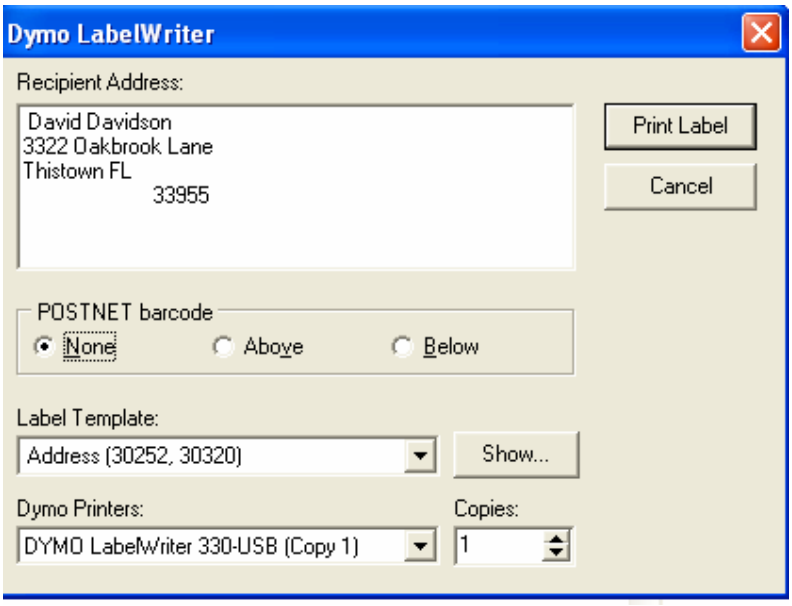


Is usually used for address labels or chart labels:

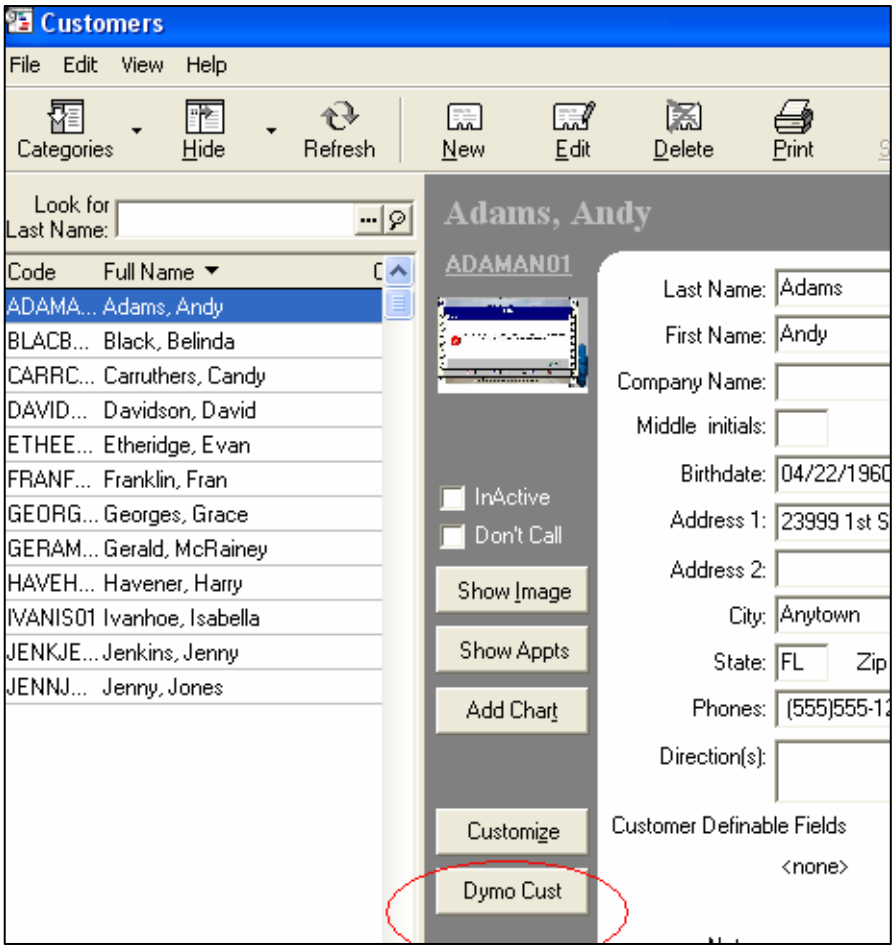


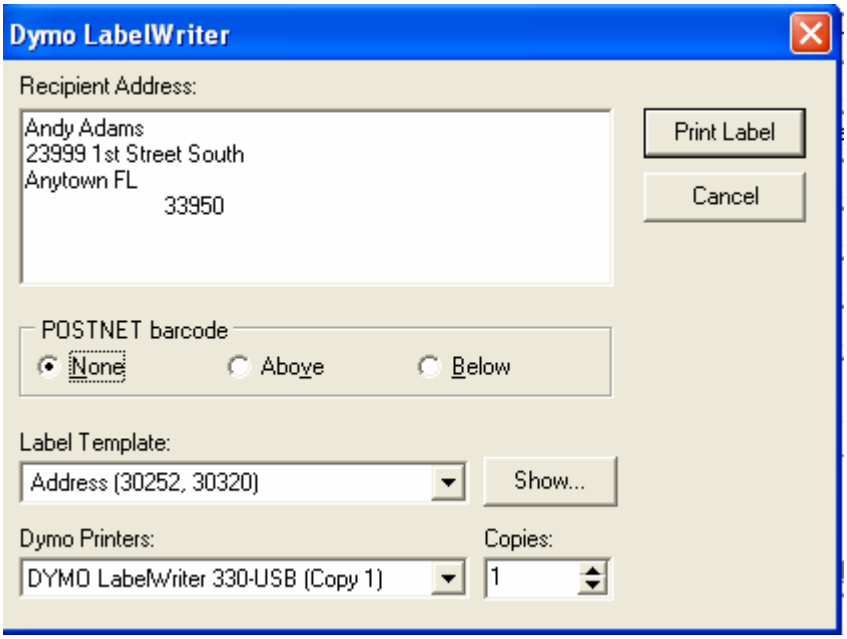
There are 2 places you can use the 'Cust Label':

1. Edit the customer's appointment and Click on 'Dymo Cust'



2. Edit the Customer and click on 'Dymo Cust'



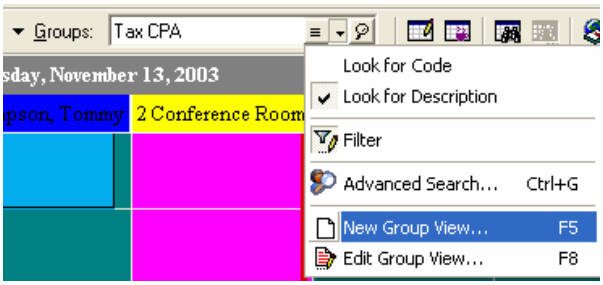


SETTING UP COLUMNS (Groups)

ScheduleVIEW™ provides multiple ways to enhance your business' productivity. Associating providers and resources into groups allows an easy way of viewing schedules side by side in Views.

To edit or create new Groups:

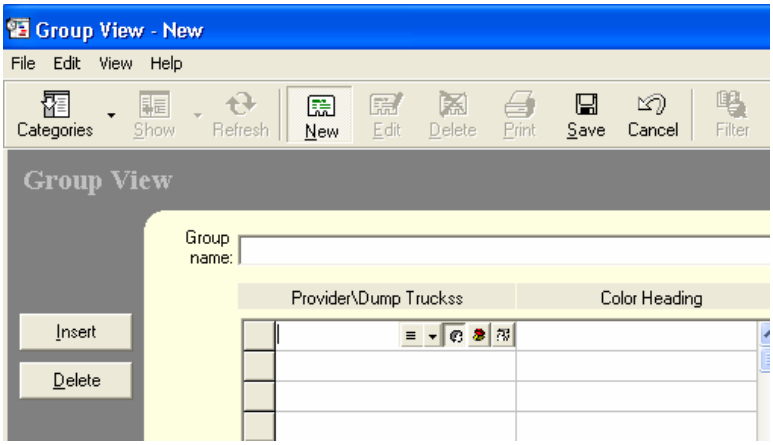
1. Go to 'Group' View (Click on 'View' 'Current View' 'Groups')



2. Click on the drop-down arrow and choose 'New Group View' or 'Edit Group View'

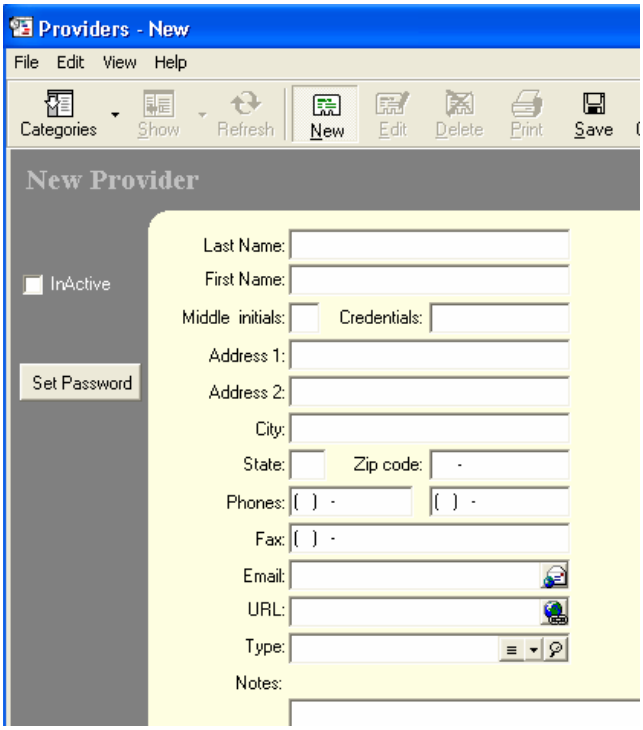
3. Enter a 'Group Name'

4. Click on 'Insert', this will bring up a row of icons:



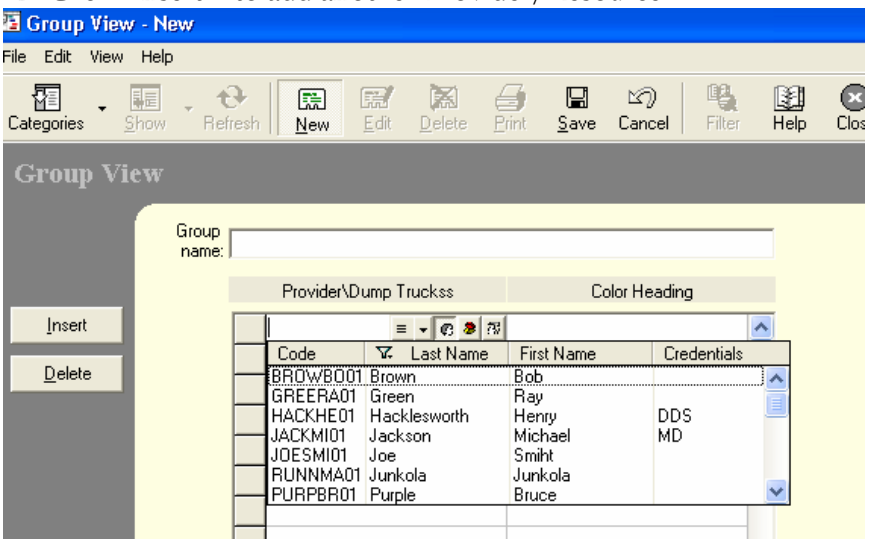
If you <u>have not</u> already entered Providers and/or Resources, follow steps 5, 6, 7, 8.
If you <u>have</u> already entered Providers and/or Resources, skip to steps 10, 11, 12.

5. Click either the 'Provider List' icon (white profile head) or the 'Resource List' icon(Red).
6. Click the drop down arrow and choose 'New Provider/Resource' and enter the information desired (The Last Name will be written as the heading of your column)
7. Click 'Save'
8. Repeat steps 4, 5, 6, 7 to add all desired Providers/Resources.

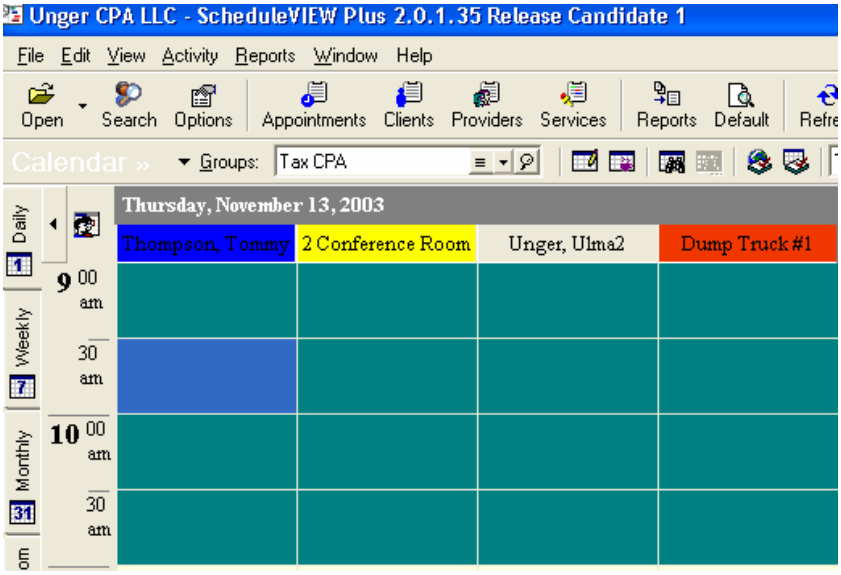


9. When you are finished, click on the "Save" button at the top, and this will take you back to the 'Group View-New' screen.

10. Click the icon which looks like a triple= sign. This brings up your list of Providers/Resources.
11. Choose one by single left click.
12. Click 'insert' to add another Provider/Resource.

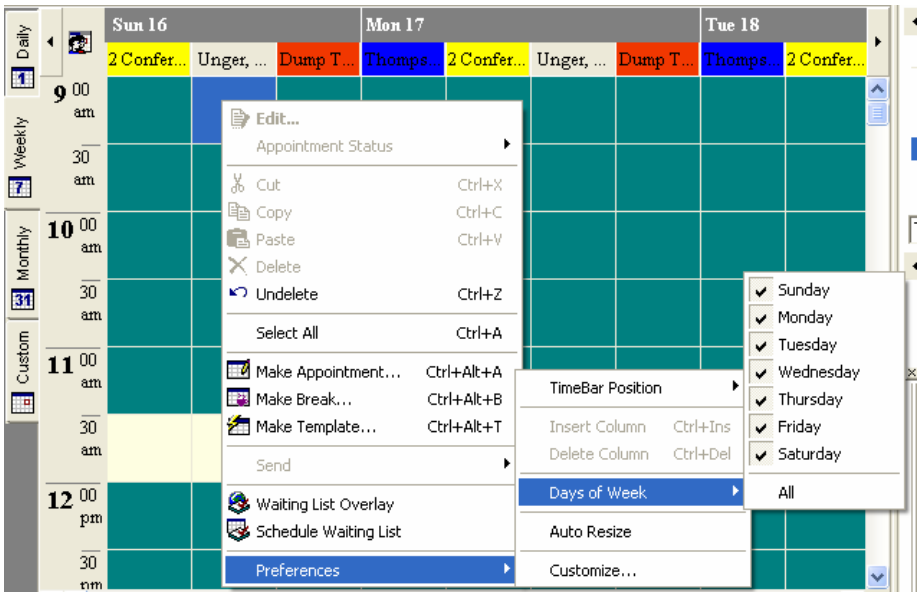


13. Click 'Save' when you have added all Providers/Resources for your group.

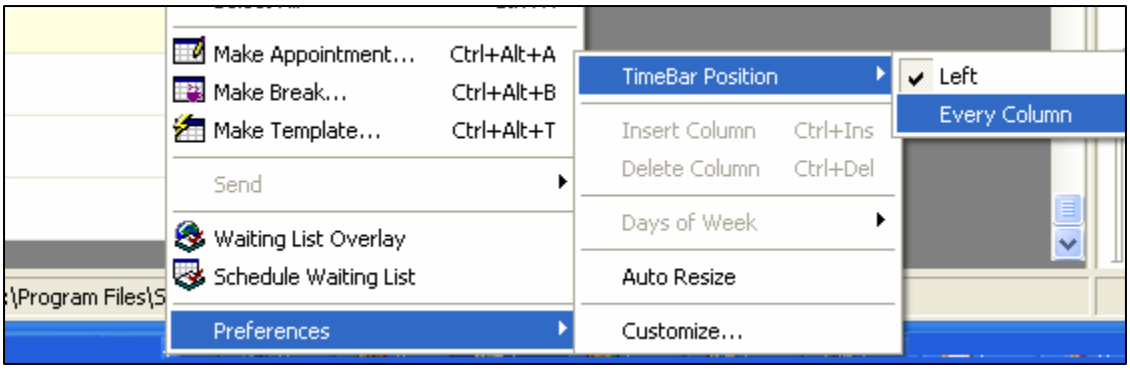


You will now see a Group View.

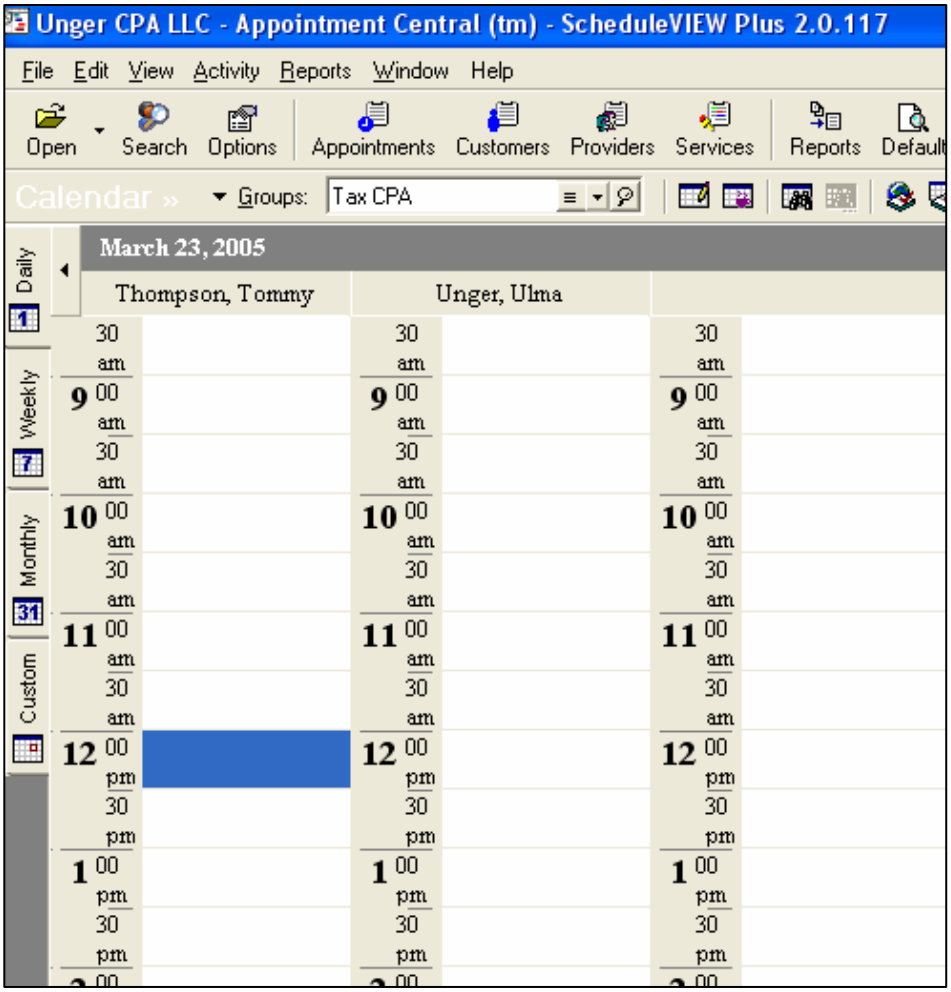
To change the days which show on your schedule grid:
Right click on a column and choose 'Preferences' and 'Days of the Week' Only check the days you wish that column to show in.



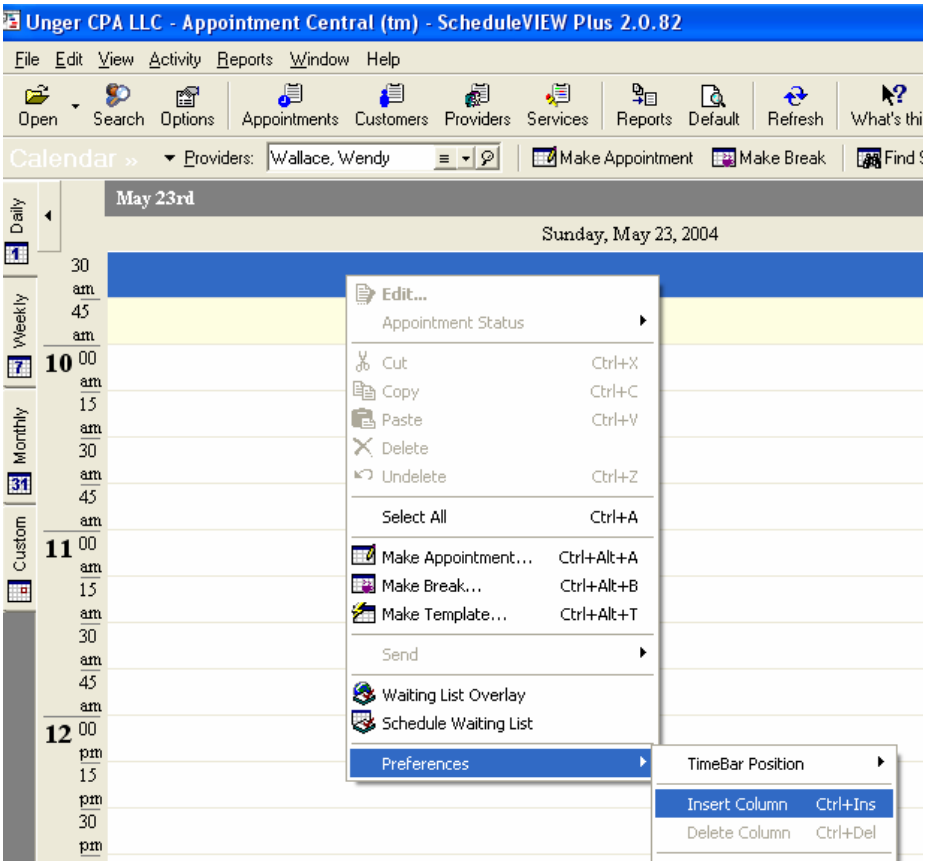
If you choose 'TimeBar Position' you can have the times just be at the left of your screen -or- go down every column:



Here is a view with the times down every column:

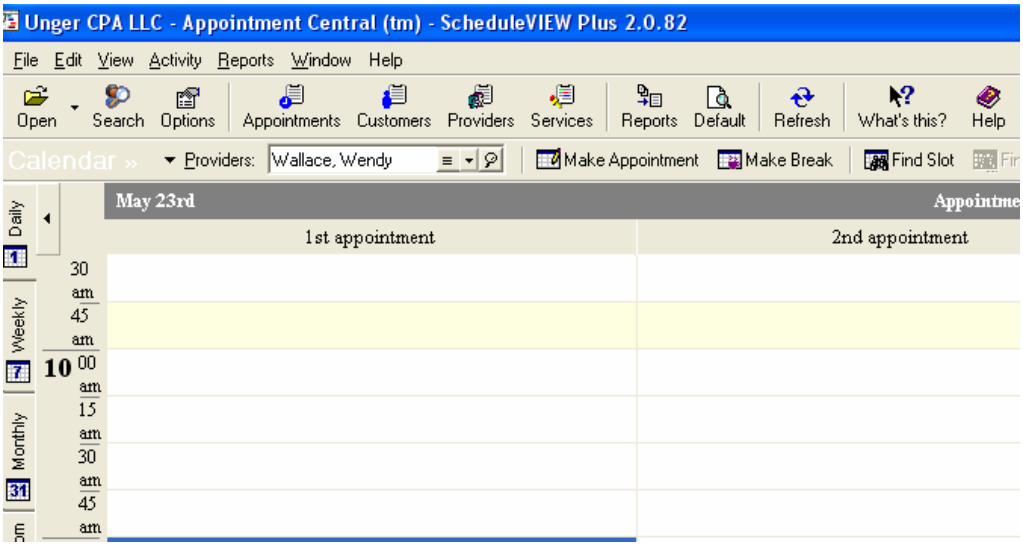


MORE THAN 1 COLUMN FOR A SINGLE PROVIDER:



Right click on your calendar page, choose 'Preferences' and 'Insert Column'

Here is your schedule with 2 appointment columns:


Unger CPA LLC - Appointment Central (tm) - ScheduleVIEW Plus 2.0.82
File Edit View Activity Reports Window Help
Open Search Options Appointments Customers Providers Services Reports Default Refresh What's this? Help
Calendar » Providers: Wallace, Wendy Make Appointment Make Break Find Slot
Daily Weekly Monthly
May 23rd
1st appointment
2nd appointment

Note: This will only work in a single Provider view, not in a Group view.

Managing Your Information

MANAGING YOUR INFORMATION

CREATING, EDITING, & DELETING INFORMATION

ScheduleVIEW™ has multiple ways to manage your business' information, through our menu system, directly from the calendar, or through the use of Quick Keys.

One of the simplest is by selecting **Edit** from the **Main Menu**, or by typing **Alt-E** as the same time.

Select a category of information to get a complete listing of entries:

Appointments
Breaks
Waiting List
Templates
Customers
Providers
Resources
Services

Group Views

Each selection brings up a multi-pane window with a complete list of entries for that category and the details of the first entry. The window also contains the following available buttons:

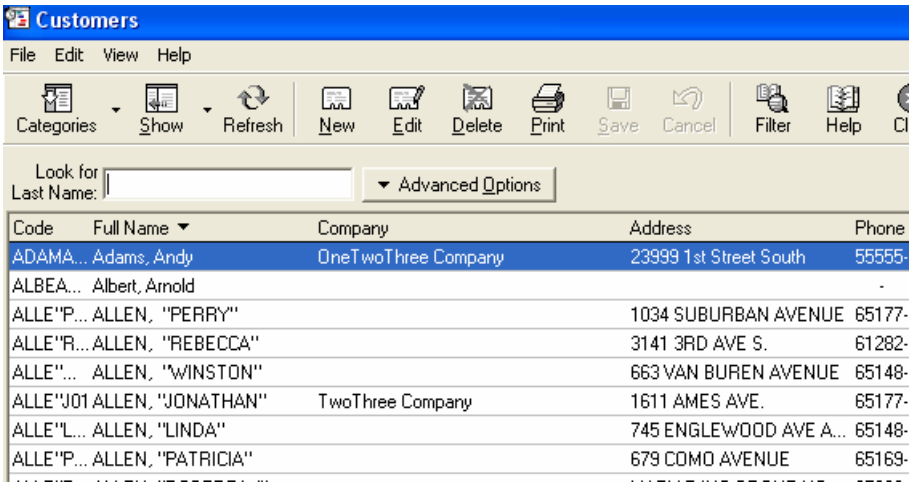
Categories: Switch views between categories of information.
Hide: Switches the multi-pane window between horizontal and vertical lists.
Refresh: Refreshes the window with the latest information from the database (important with multiple users).
New: Create a new entry in the database under that category.
Edit: Allows editing of the currently selected entry.
Delete: Deletes the currently selected entry.
Print: Prints detail on the currently selected entry.
Save: Only available when in Edit or New mode.
Cancel: Only available when in Edit or New mode

Help: Brings up the Help System.
Close Closes the Edit Window and returns you to the main window.

To Add a new customer to your database or change customer info:

Click on the **Customers** icon

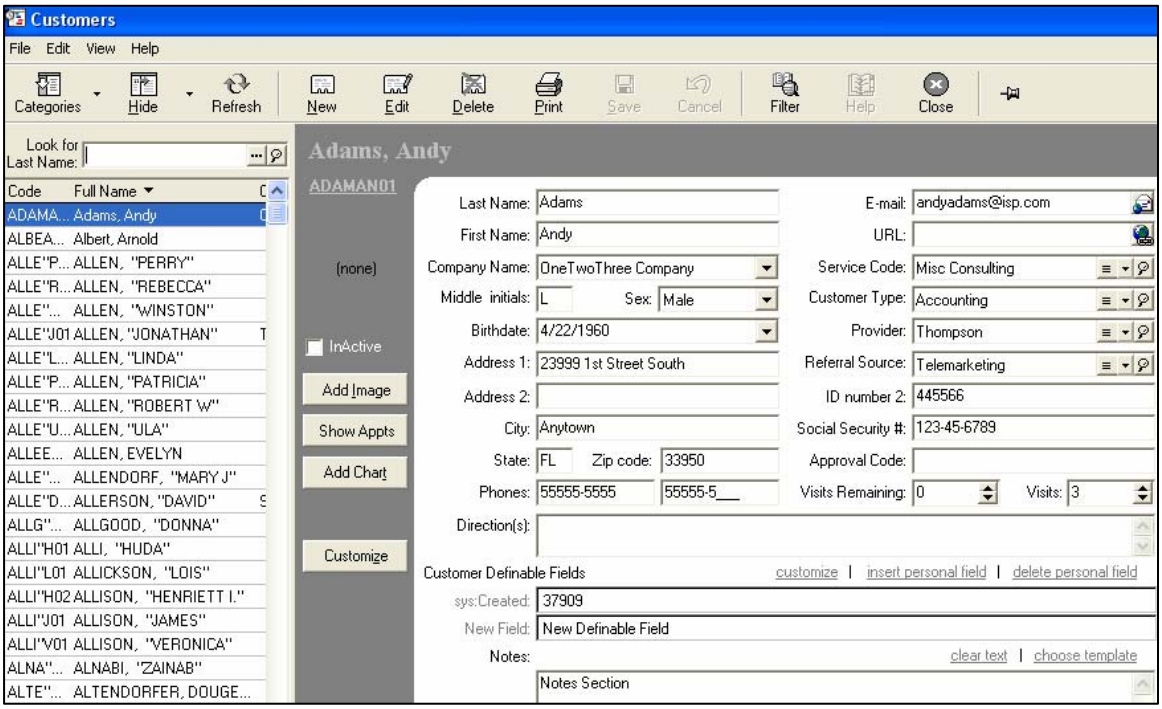
at the top of your calendar page.


Customers
File Edit View Help
Categories Show Refresh New Edit Delete Print Save Cancel Filter Help
Look for Last Name:
Advanced Options
Code Full Name Company Address Phone
ADAMA... Adams, Andy OneTwoThree Company 23999 1st Street South 55555-
ALBEA... Albert, Arnold
ALLE"P... ALLEN, "PERRY" 1034 SUBURBAN AVENUE 65177-
ALLE"R... ALLEN, "REBECCA" 3141 3RD AVE S. 61282-
ALLE"... ALLEN, "WINSTON" 663 VAN BUREN AVENUE 65148-
ALLE"J01 ALLEN, "JONATHAN" TwoThree Company 1611 AMES AVE. 65177-
ALLE"L... ALLEN, "LINDA" 745 ENGLEWOOD AVE A... 65148-
ALLE"P... ALLEN, "PATRICIA" 679 COMO AVENUE 65169-

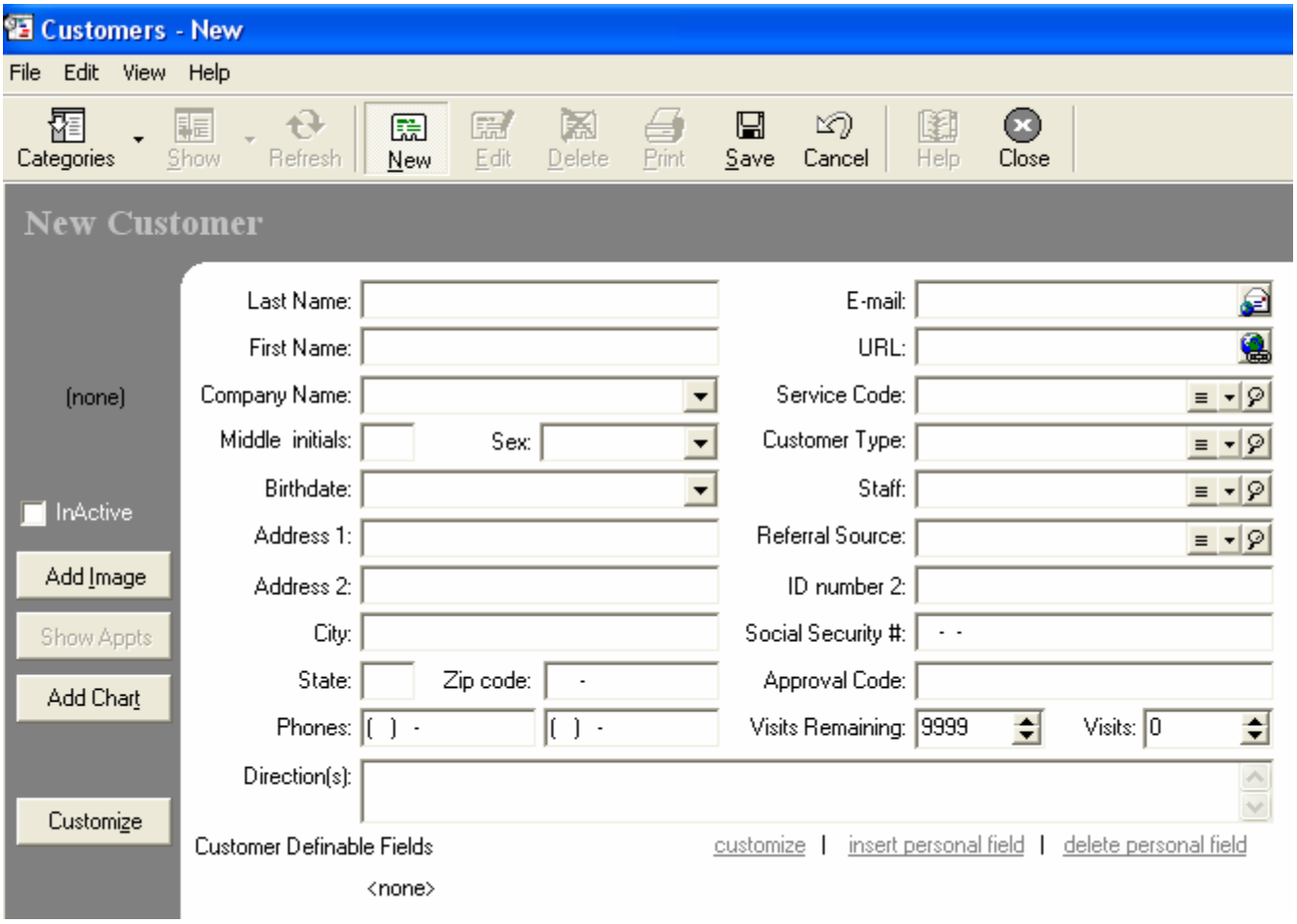
This view shows your customer list only.

If you would like to see the customer list and the edit customers screen click on the **Show**

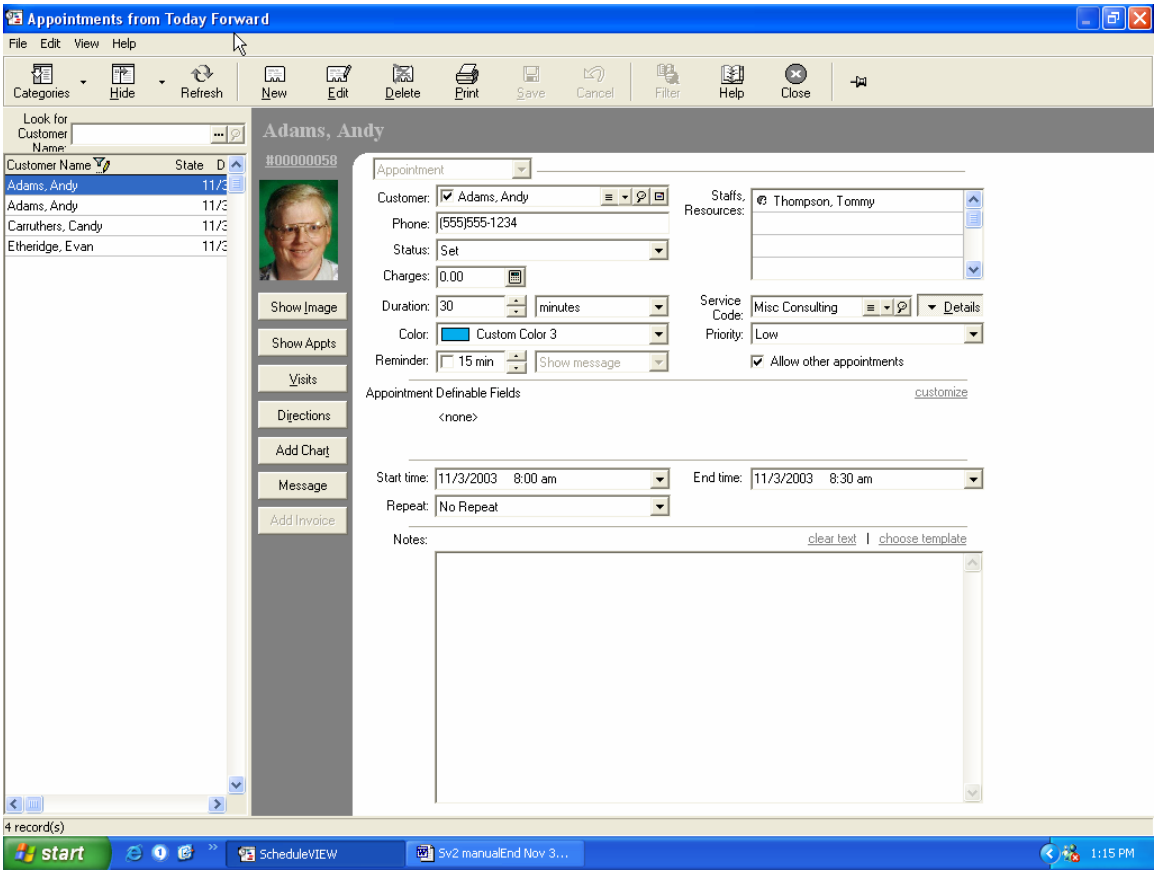
icon and you will see this view:



Fill in all the new customer information and click the 'Save' icon.



Selecting **Appointments** from the Edit Menu brings up the **Today's Appointments** Window and shows all of the day's appointments in the left hand pane. Selecting an appointment in the left hand pane will highlight its detail in the large, right hand pane and allow editing of the appointment information. Press the **Save** Button to save your changes. Add a new appointment by pressing the **New** button. Delete an appointment by pressing the **Delete** button.



Customer: ☑ next to the name indicates that the customer is already in your database. Simply start typing and information on that customer will fill in for this appointment.

Phone: Enter or edit the customer phone number here.

Status: This is Appointment Status, which changes as the appointment is cancelled, late, no-show, arrived or completed.

Charges: Enter the appointment charges here.

Duration: Enter the appointment duration in minutes, hours, or days.

Color: Set the appointment color that will show in your appointment grid.

Reminder: Set the Reminder parameters here, including setting up a reminder message and a time to email.

Start and End Time: Enter the appointment Start and End Times. To change the date, simply press the ▼ button and select another date from the drop-down calendar. To change the time, highlight and type over.

Repeat: Enter the parameters if this is a repeating appointment. **ScheduleVIEW™** will automatically create all the appointments for you!

Providers/Resources: Enter the specific providers and resources needed to accomplish this appointment. Select them from the database, or add new ones.

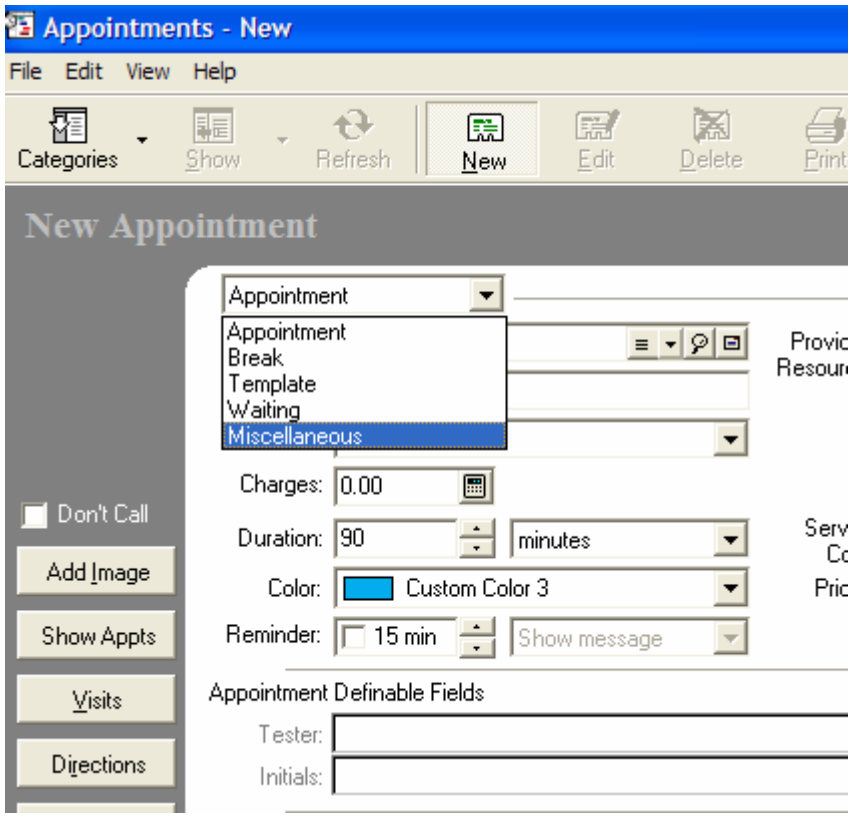
Service Code: Enter the type of service provided in this appointment by selecting from the database or by adding a new one. Entering a service code will automatically fill in default values for duration, priority, color, allow other appointments and a number of fields.

Priority: Set a low, medium or high priority for this appointment. Set a low priority for an appointment if this space can be filled with emergencies, etc.

Allow Other Appointments: Check yes if this appointment can be concurrent with others. Leaving this blank will prevent double booking of appointments. (You may disable double-booking when you set up security. See 'Permissions' in this manual.)

Notes: Special Appointment or Customer notes. This will default to the notes from the Customer's data record.

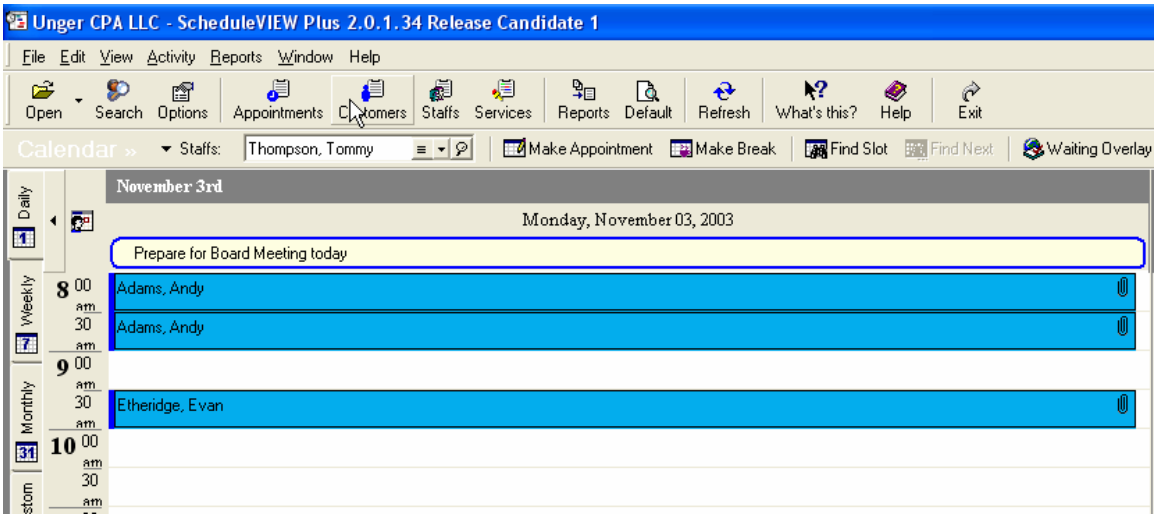
APPOINTMENTS - MISCELLANEOUS



Miscellaneous appointments are basically for informational purposes

They are best used when you click the option to "Show in Header".

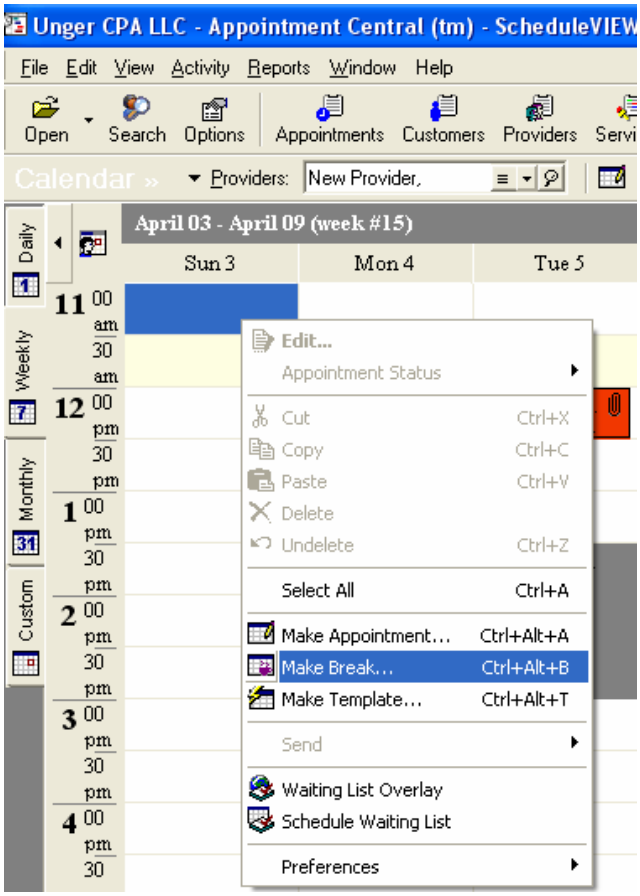
When you choose to "Show in Header" the Miscellaneous appointment shows at the top of the column for the particular provider and is "FIXED" in that location. We think it most useful as a "reminder" or "todo". When the "Show in Header" option is selected, your daily appointment screen would look like this:


Unger CPA LLC - ScheduleVIEW Plus 2.0.1.34 Release Candidate 1
File Edit View Activity Reports Window Help
Open Search Options Appointments Customers Staffs Services Reports Default Refresh What's this? Help Exit
Calendar » Staffs: Thompson, Tommy Make Appointment Make Break Find Slot Find Next Waiting Overlay
Daily
Weekly
Monthly
November 3rd
Monday, November 03, 2003
Prepare for Board Meeting today
8 00 am
Adams, Andy
30 am
Adams, Andy
9 00 am
30 am
Etheridge, Evan
10 00 am
30 am

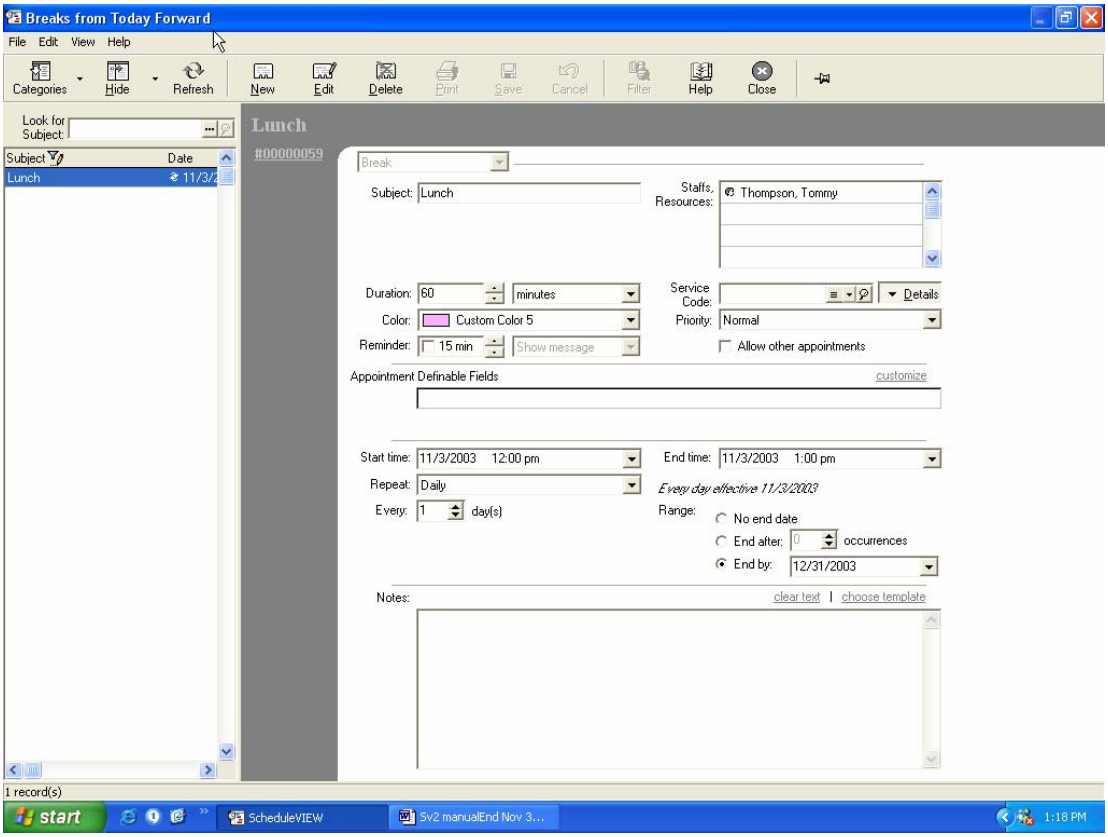
See how the Message "Prepare for Board Meeting Today" is at the top of the header for that day and is not assigned any time frame? They will have rounded corners for easy identification.

BREAKS

Breaks are blocks of time in which providers and resources are unavailable for scheduling such as lunches, holidays, vacations, seminars, and days off. If you add an appointment to this timeslot, it will be double-booked with the break still showing.



On your calendar page Right Click on the time you want to create your break and choose 'Make Break'



Subject: A description of the Break

Providers, Resources: The Providers and Resources who will have this break on their schedule.

Duration: The amount of time for the break in minutes, hours, or days.

Service Code: You can optionally set up a Service Code to track breaks in reports.

Color: The color of the break as it appears in the Daily Calendar.

Priority: Set a priority for the break of normal, low or high

Reminder: Set up Reminder for the Break. Enter a ☑ and then select the time to send the message out. Then press the ▼ button to select Show Message, Send Email, or Send Letter.

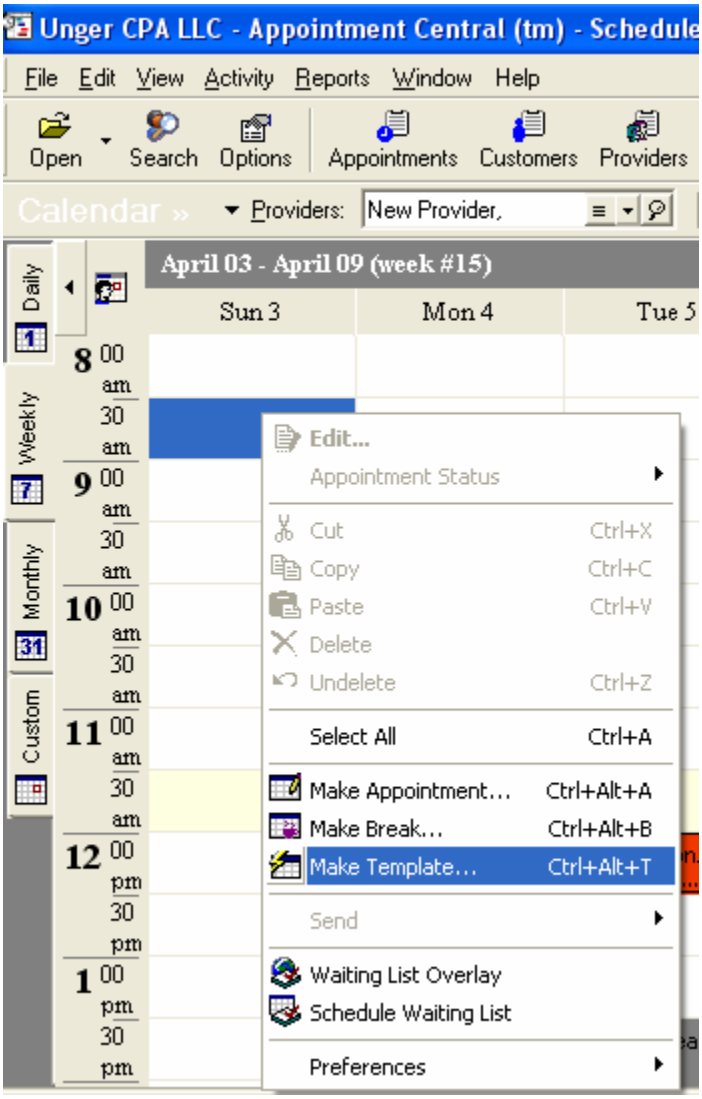
Start and End Time: Enter the Start and End Times. To change the date, simply press the ▼ button and select another date from the drop-down calendar. To change the time, highlight and type over.

Repeat: Select how frequently this Break should be repeated. **ScheduleVIEW™** will prompt you to set the parameters for the repeating breaks, their frequency and duration, and create the repeating breaks when you **Save** the Break.

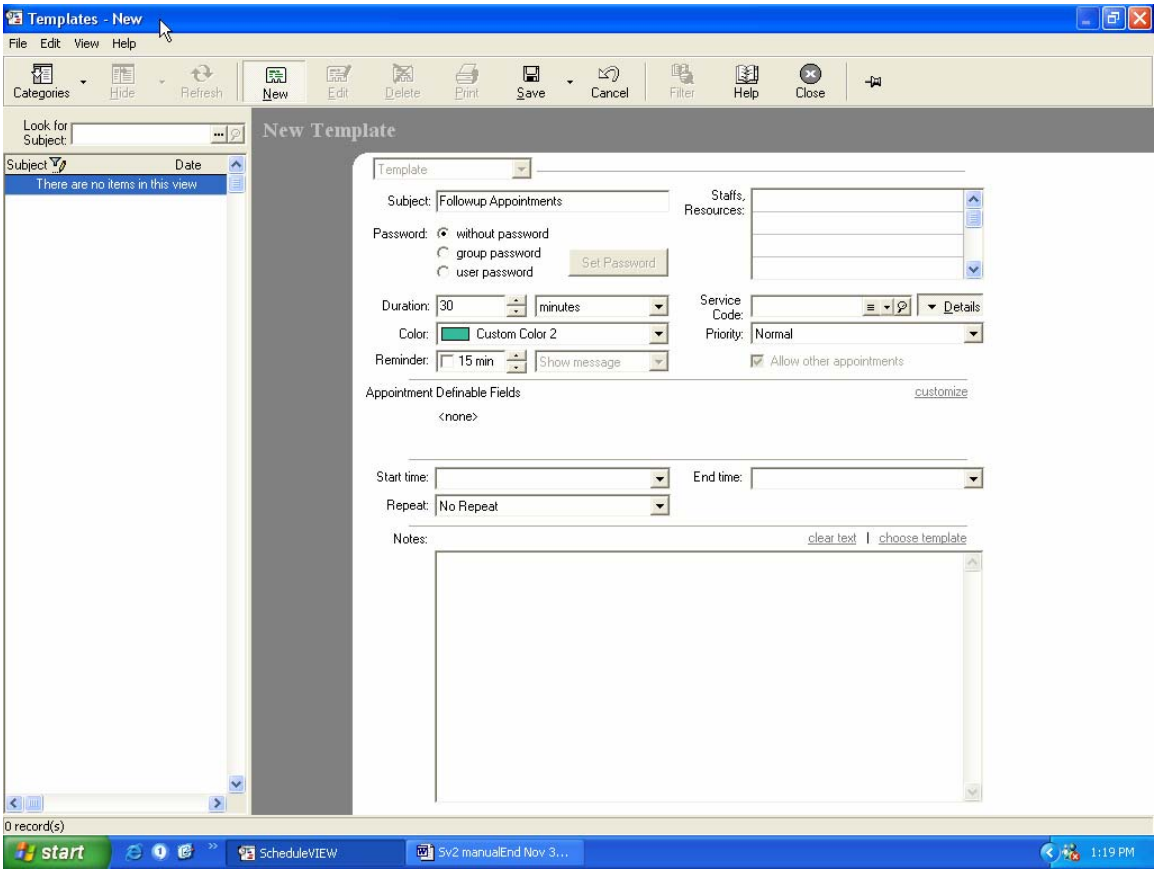
Notes: Enter any notes about this Break here. Or select a template (A pre-written set of notes) to paste in here.

APPOINTMENT TEMPLATES

Appointment Templates are used to "RESERVE" specific appointment slots for specific Service codes or specific reasons. For example if you want to block 9-12 noon on Monday, Wednesday, and Fridays for New Customers; or if you wanted to schedule 9-12 noon for a specific type of service code, or if you wanted to schedule Follow-up visits. When you add an appointment to this timeslot, the template will erase and only your appointment will show. Templates may also be password protected.



On your calendar page Right Click on the time you want to create your Template and choose 'Make Template'



Fields in the **Appointment Template Window** are as follows:

Subject: A description of the Appointment Template

Providers, Resources: The Providers and Resources who will have this Appointment Template on their schedule.

Duration: The amount of time for the Appointment Template in minutes, hours, or days.

Service Code: The Service Code reserved for this Appointment Template.

Color: The color of the Appointment Template as it appears in the Daily Calendar. Please note that Appointment Templates always show up in the Calendar with a red line next to them.

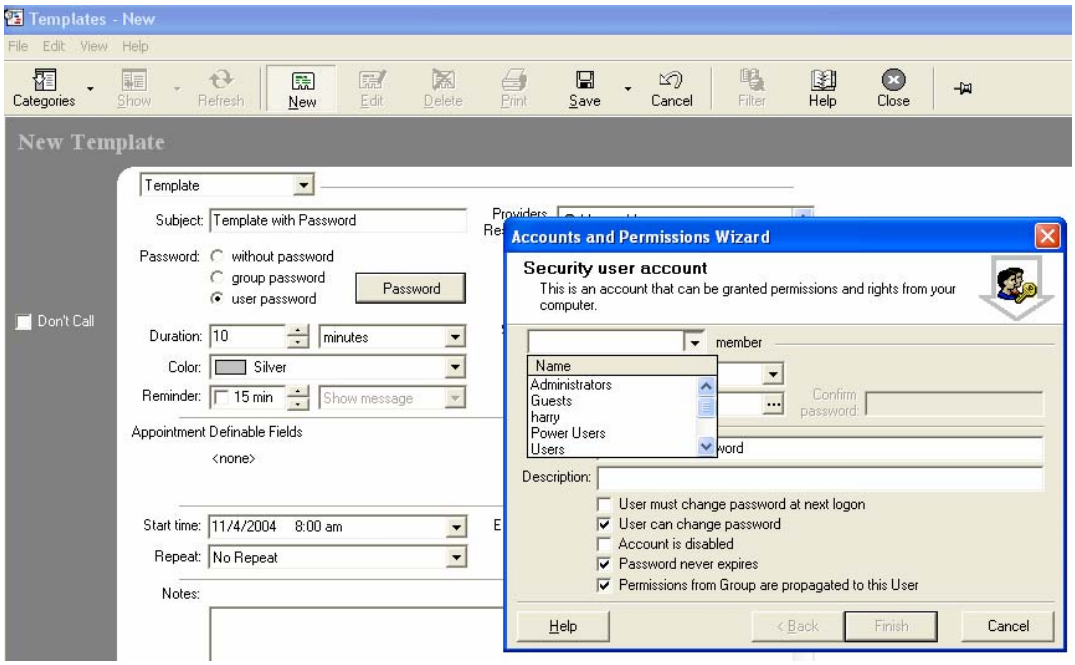
Priority: Set a priority for the Appointment Template of normal, low or high

Reminder: Set up Reminder for the Appointment Template. Enter a ☑ and then select the time to send the message out. Then press the ▼ button to select Show Message, Send Email, or Send Letter.

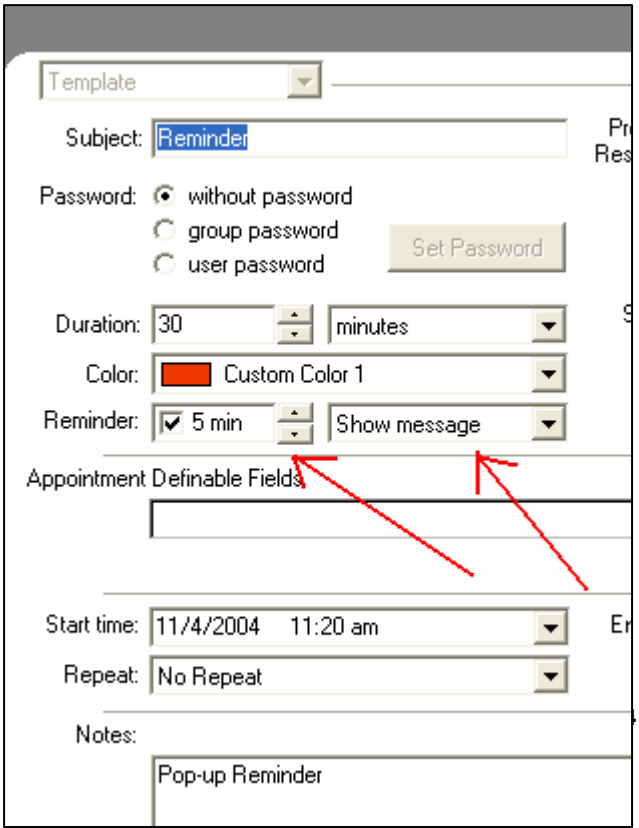
Start and End Time: Enter the Start and End Times. To change the date, simply press the ▼ button and select another date from the drop-down calendar. To change the time, highlight and type over.

Repeat: Select how frequently this Appointment Template should be repeated. **ScheduleVIEW™** will prompt you to set the parameters for the repeating templates, their frequency and duration, and create the repeating templates when you Save the Appointment Template.

Notes: Enter any notes about this Appointment Template here. Any notes that you enter here will "POPUP" in a message box that the user will have to click OK to remove the message box. This is useful as a "Reminder" for what the template is reserved for. For example "New Customers only are to be scheduled in this time slot".



You can **password protect** the template so no one can schedule without permission.

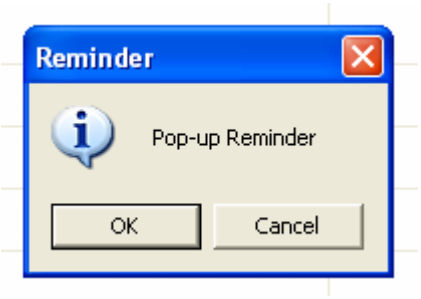


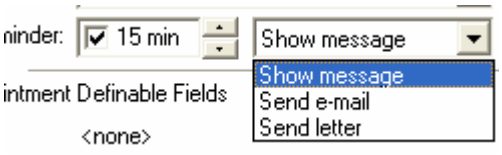
WARNING POPUPS

If you would like to warn or remind yourself at any point during the day you can set up a template to do so.

In this example we chose 'Reminder' of 5 minutes and 'Show message'.

5 minutes before the start time of the template the 'Notes' pop up on the ScheduleVIEW™ screen.



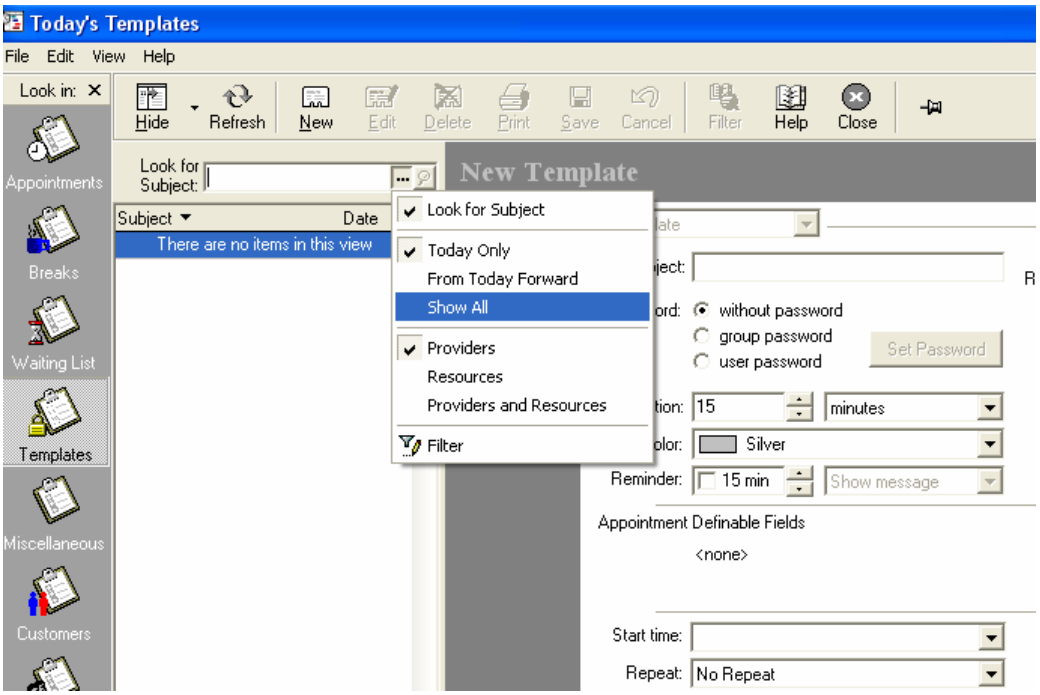


You can also choose to 'send an email'.

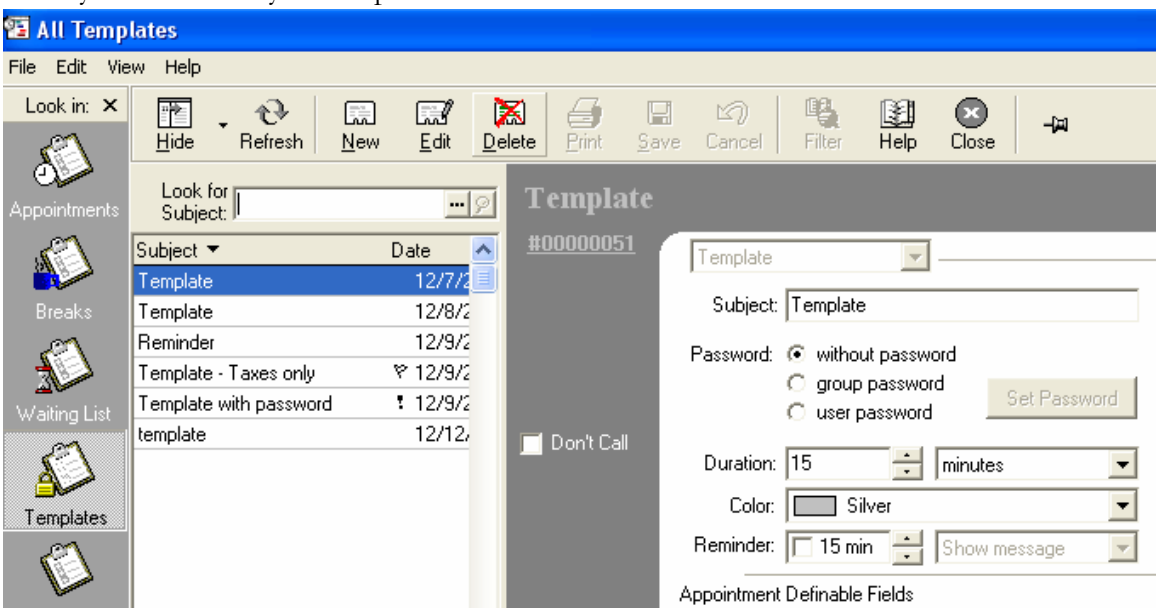
The 'send letter' will bring up your default Reminder Message for you to work with it.

TO DELETE OR EDIT YOUR TEMPLATES: Click on 'Edit' 'Templates'

To view your list of templates click on ... and choose:
'Today Only' 'From Today Forward' or 'Show All'



Now you can choose your template and delete or edit it.

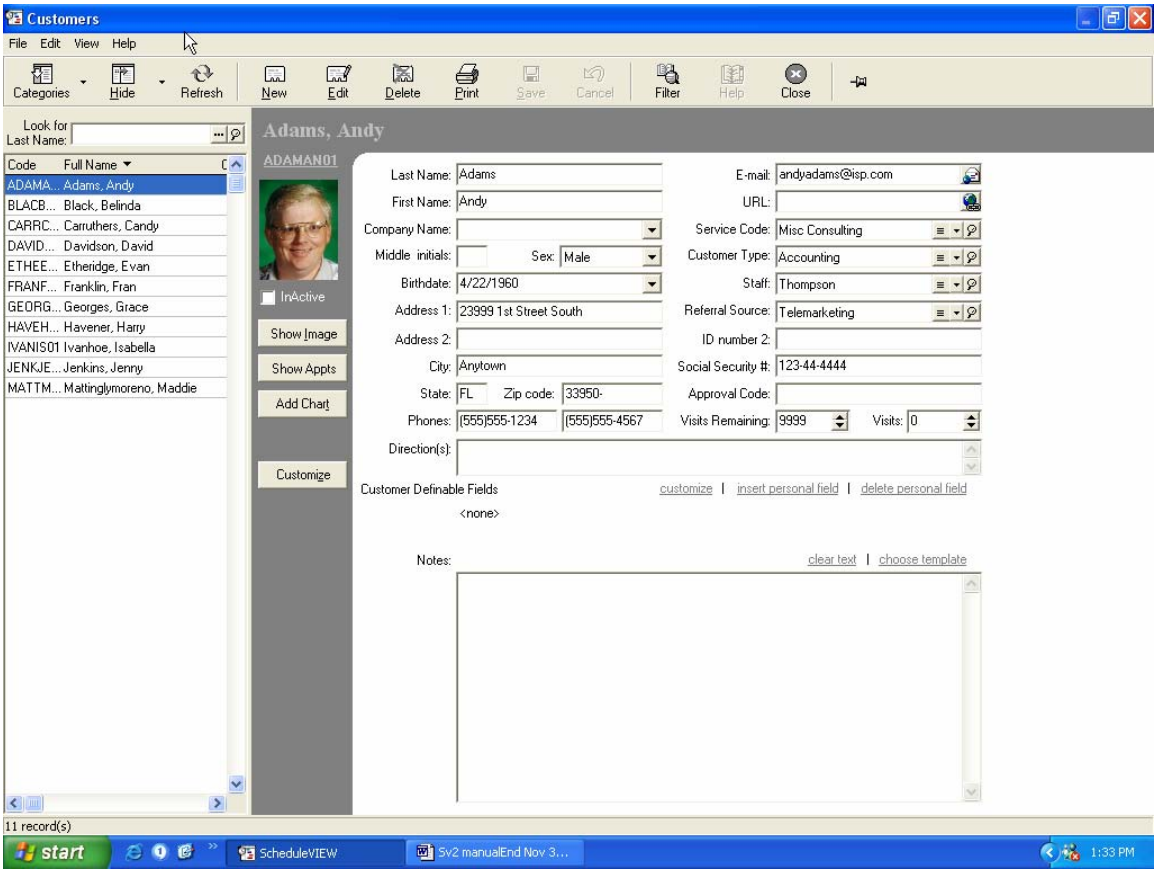


CUSTOMER INFORMATION:

Here's Another Way To Do It!

Add or Edit customer information directly from an Appointment Window by pressing the Down Arrow button and selecting New Customer (F5) or Edit Customer (F8)
Or just press F5 or F8 when the cursor is in the customer name lookup box.

Maintaining good customer information is the lifeblood of any successful business. Selecting **Customer** from the **Edit Menu** brings up a list of all your customers from the Customer Database and allows you to add, edit, or delete customers. Checking the inactive box will ensure that the customer remains in your database with a status of inactive but does not show in appointment lists.



Fields in the **Customer Window** are as follows:

Last Name: The Customer's Last Name.

First Name: The Customer's First Name.

Company Name Many medical offices use this field for the insurance company name.

Middle Initial: The Customer's Middle Initial.

Sex: The Customer's Sex.

Birthdate: The Customer's Birthdate.

Address 1: The Customer's Address, line 1

Address 2: An optional second line for Customer Address

City The Customer's City

State: The 2-character Customer State

Zip Code Customer Zip Code. Please note the zip code format can be changed in the

Options section for extensions, or other countries..

Phones: Customer Phone Numbers. The format for the phone numbers may be changed in the **Options** section to include area code and/or extension.

Email Address: Customer Email Address

URL Customer's Website Address

Service Code The default Service Code for this Customer

Customer Type Use this field to classify your customers however you like: Cash, Charge – Local, Distance – Plumbing, Drywall - etc.

Provider The default Provider for this Customer.

Referral Source Use this field to identify who referred your customer to you or how they found out about you.

ID Number 2: Optional alpha/numeric identification field

Social Security: Customer's Social Security Number

Approval Code: Approval Codes can be used for an insurance policy number, or for a reference number for contracts or invoices.

Visits Remaining: This field allows you to keep track of authorized visits by listing how many visits are remaining on a customer's service contract or insurance program. If in place, a warning message will pop-up when the customer has used up the contracted visits.

Visit: This field shows how many visits have been scheduled for your client. The total will continue to add during multiple service contracts/insurance approvals.

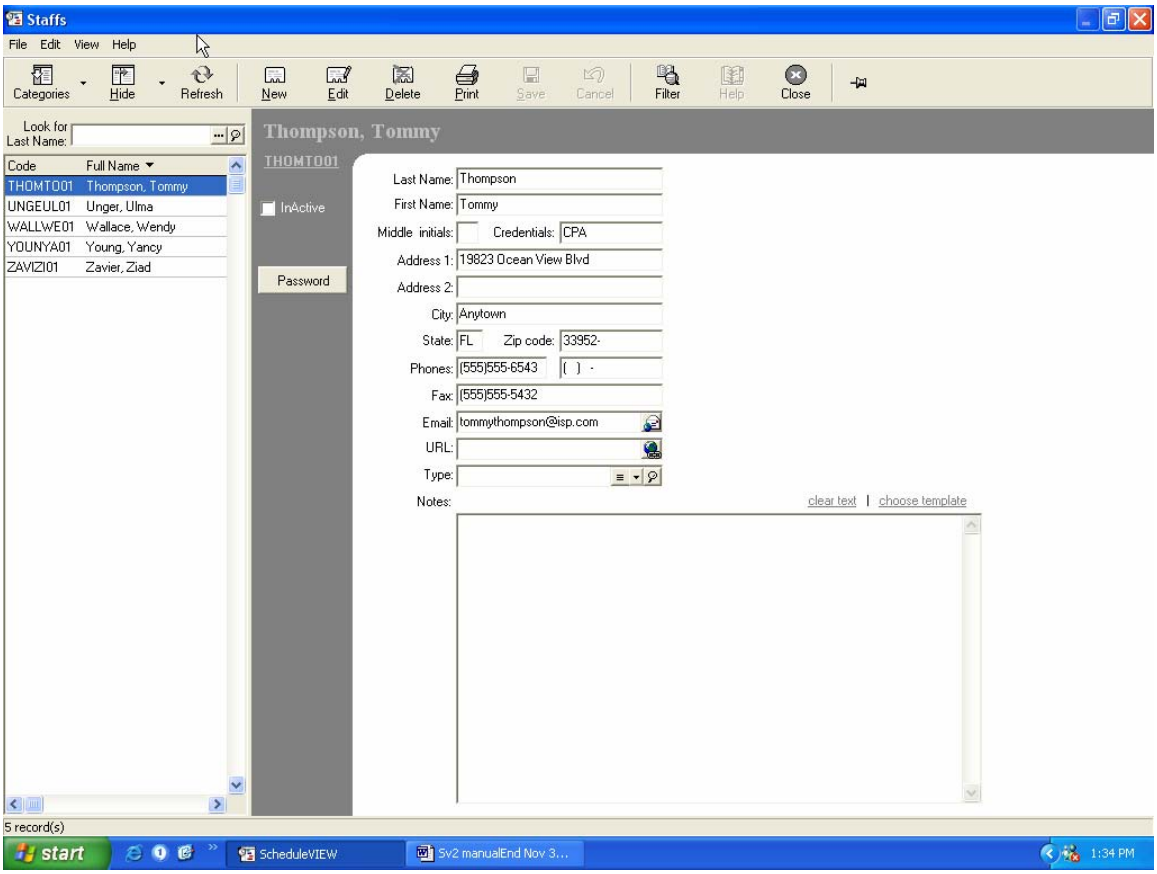
Directions: This is an optional field that will provide popup directions to a customer's residence or business. Be creative and use this field for whatever additional information you may want to let your providers know.

Definable Fields: **ScheduleVIEW™** allows you to set up Definable Fields that apply to all your customers, or Personal Fields for one specific customer.

Notes: Enter here any permanent, default, or ongoing notes about the customer and their appointments. Whatever you type will always show also in the **New\Edit Appointment Window** when you select this customer**.** Again, please note: **Customer Notes** will show up every time an appointment is made for that customer. (Notes put into the Appointment screen will only show on the specific appointment they are entered into.)

PROVIDERS

Providers are your employees, contractors, anyone who provides services to your customers. Having a provider is **mandatory** for scheduling appointments. Entering Provider information helps you track productivity through **ScheduleVIEW™'s** reporting system.



Fields in the **Provider Window** are as follows:

Last Name: The Provider's Last Name.

First Name: The Provider's First Name.

Middle Initial: The Provider's Middle Initial

Credentials: The Provider's Credentials. This can be licensing information or degrees.

Address 1: The Provider's Address – needed to mail Provider Reminders.

Address 2: An optional second line for Provider Address

City The Provider's City

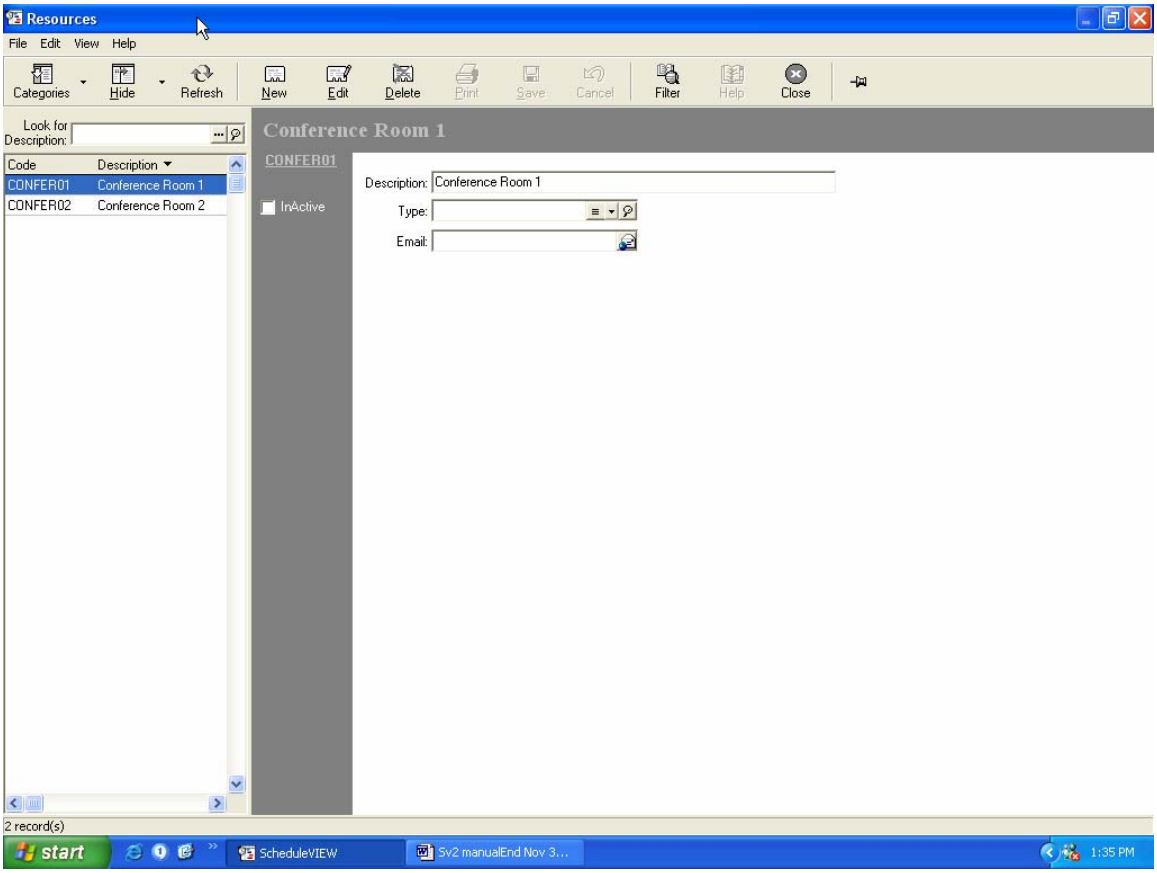
State: The 2-character Provider's State

Zip Code	Provider's Zip Code
Phones:	Provider's Phone Numbers – space for ten numbers
Email Address:	Provider's Email Address – for emailing reminders
URL	Provider's Website Address

RESOURCES

Resources in **ScheduleVIEW™** are places and things you need to ensure that your appointments can be completed. This can be such things as an x-ray machine, conference room, a truck or a piece of equipment.

Entering resource information in **ScheduleVIEW™** allows you to track the utilization of these important and often expensive items and ensures that you have the right place and the right tools at the right time to meet your customer appointments.



Fields in the **Resource Window** are as follows:

Description: A Description of the Resource

Type: A Type code that allows multiple resources to be associated by their type.

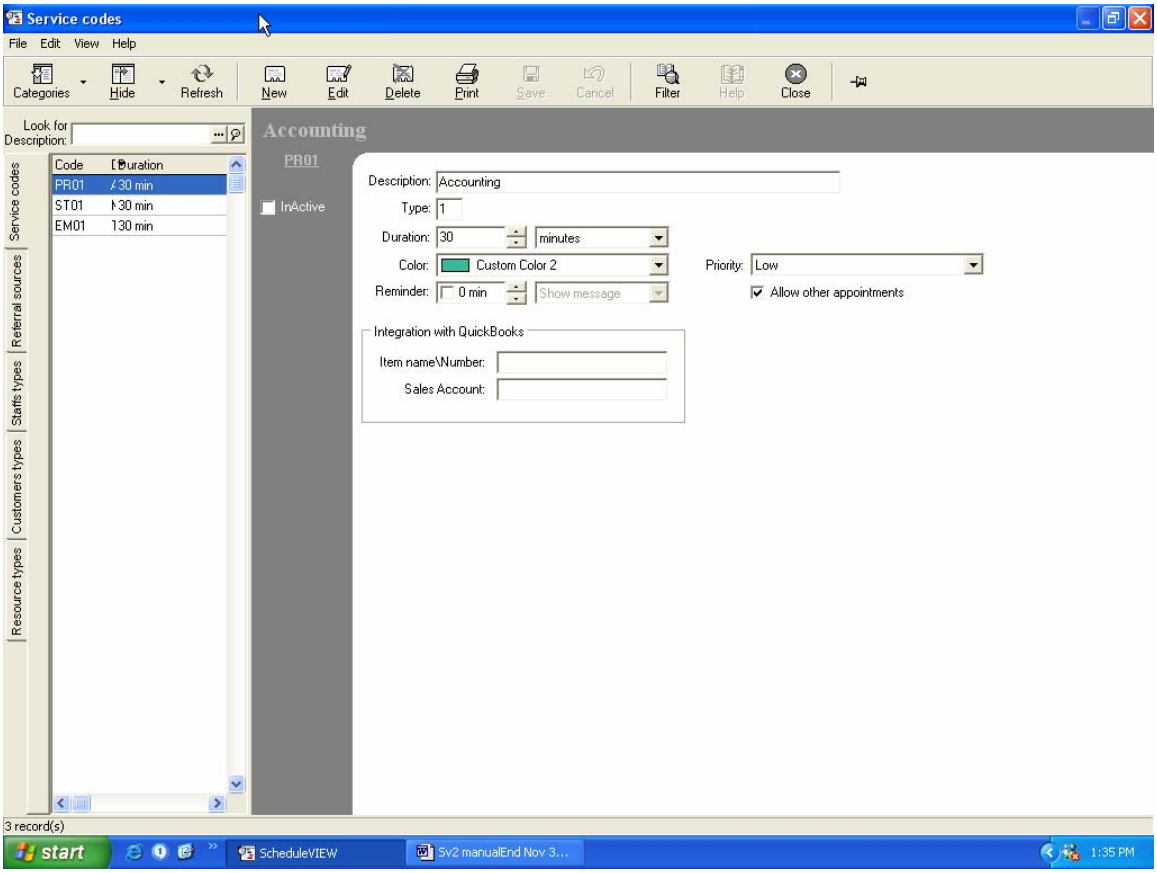
Email: Email address for email reminders.

***NOTE**: Instead of using Resources, you may just want to add rooms or equipment as regular Providers.*

SERVICE CODES

Service codes document the services you provide and help you discern through **ScheduleVIEW™**'s comprehensive reporting system, which services are most profitable for your business. This can be Initial Consultation, Follow Up Visit, Quote Needed or customize it to the service rendered such as Plumbing, Roofing, Appraisal etc.

Fields entered here are automatically used as defaults in the appointment scheduling process.



Fields in the **Service Code Window** are as follows:

Description A description of the service your business provides.

Type: A code that allows multiple services to be associated by their type.

Duration: A default duration for this service in minutes or hours.

Color: A default color to be used in calendar views for this service code.

Reminder: Determines how and when reminders are set out for these service codes.

Priority: Priority on this service code that will automatically propagate to the appointment window. Priorities are low, normal, high.

If you have **ScheduleVIEW™ Plus** and **QuickBooks Pro or Premier 2002 or newer:**

Item Name/Number: This is the item code from **Quickbooks.**

Sales Account: This is the Sales Account from **QuickBooks.**

Referral Sources; Provider types; Customer types; Resource types.

To edit any of these "Types", click EDIT; then Services; then look on the vertical Tab bar on the left hand side of the screen and click on the appropriate selection.

Referral Sources are either people or marketing activities that bring customers in the door. **ScheduleVIEW™** can track these sources so that you can see what marketing activities or referring people or organizations are bringing you the most customers. The report is called the Referral Source Report. You can define the referral sources here, then assign them to a customer in the ADD\EDIT customer screen.

Provider Types; Customer Types; and Resource Types are provided just for informational purposes to help you track these types. Provider and Customer types may also be selected when running a Provider List report or Customer List report.

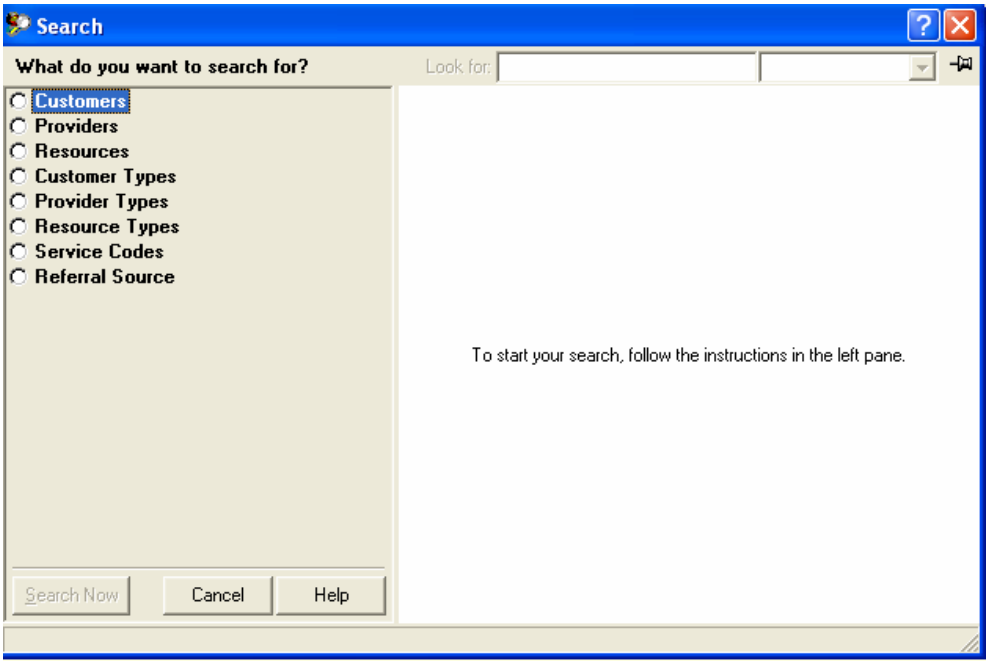
SEARCHING FOR INFORMATION

This will allow you to find specific information about your business.

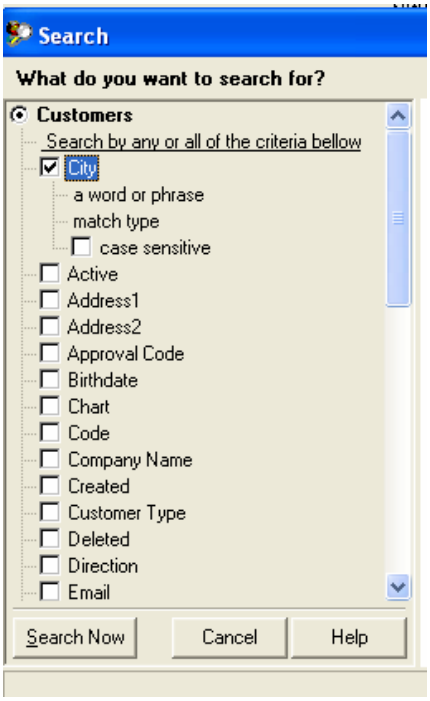
EXAMPLE #1: For this example you will be able to see all your customers in a certain city.

Click on the 'Search' icon

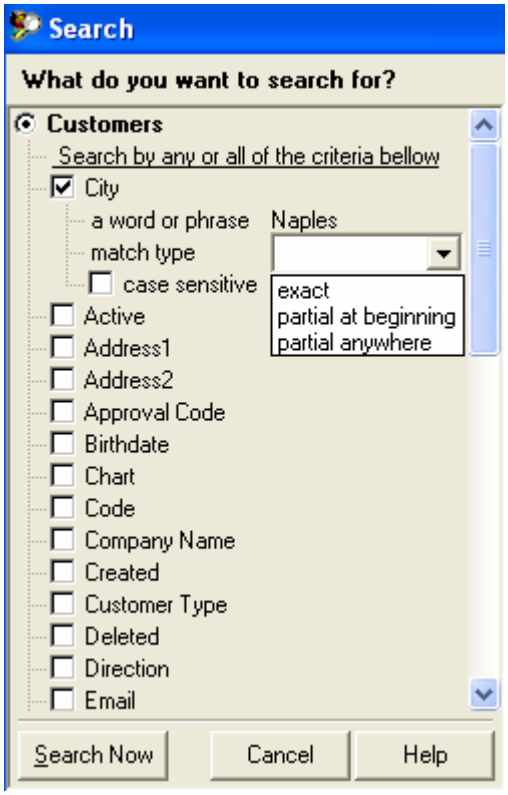
at the top of your calendar page.



Click on 'Customers'



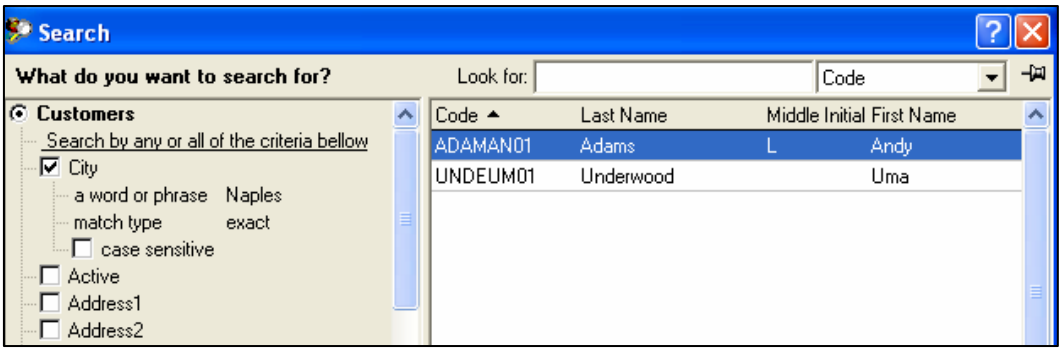
Choose 'City' to bring up fields to narrow your search



Click on 'A word or phrase' and fill in the City Name you want to search for (For this example it is Naples)

Click on 'Match Type' and your choice. (For this example we will choose exact)

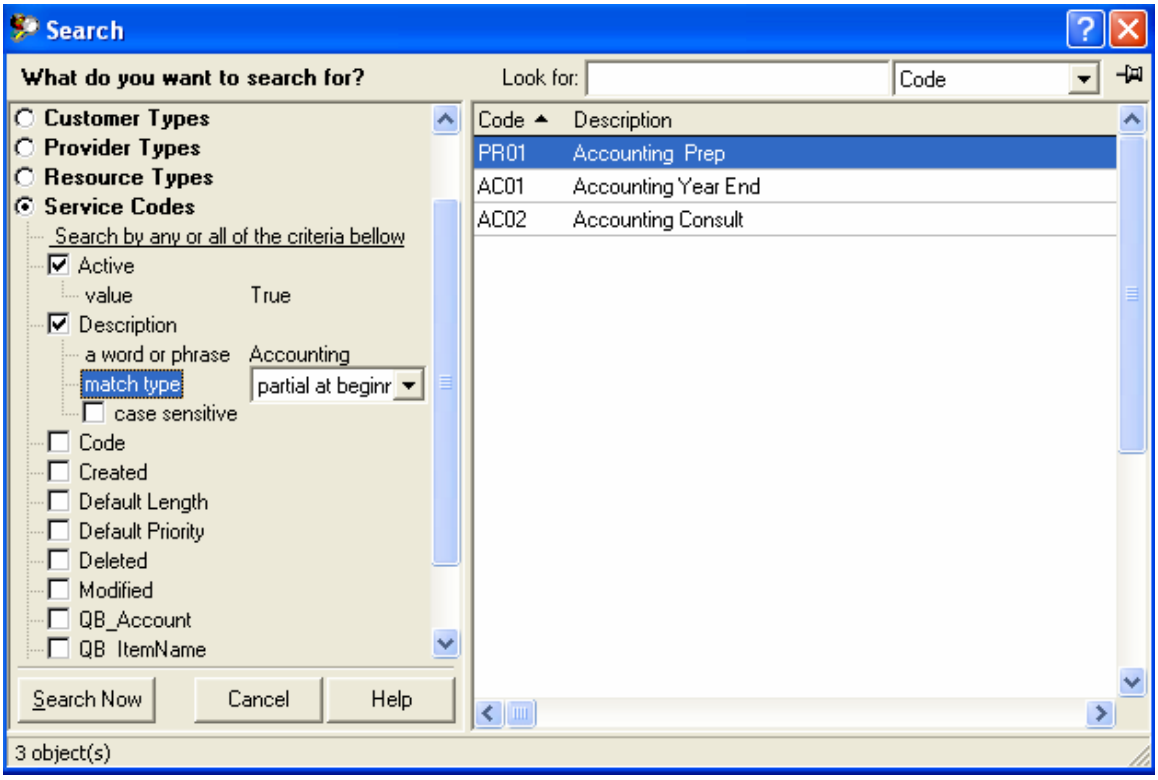
This shows your results:
There are two customers in Naples - Andy Adams, and Uma Underwood.



EXAMPLE #2: For this example we have chosen 'Service Codes'

By choosing 'Active' and a value of 'True' the report will show only active service codes.

'Description' is **Accounting** and we have chosen 'Partial at Beginning' which results in three Service Codes beginning with the word *Accounting*.



TODAY, WEEKLY, MONTHLY & CUSTOM VIEWS

Not every person using **ScheduleVIEW™** wishes to look at information in the same way. Managers may choose to look at overviews of the week or month, or specific utilizations of providers and resources. Appointment setters and providers may wish to focus on just a day's activity. Account managers may wish to view the activities of groups.

ScheduleVIEW™ has created several different ways to look at information, called **Views**.

The Today View is your homepage for **ScheduleVIEW™.** Customize this view to show all your appointments for the day, your messages, waiting lists, tips, and frequently used reports. Even add in your favorite links and display your favorite website!

ScheduleVIEW™ also has several **Calendar Views** that displays information in multiple ways:

- **The Daily View** shows a provider, resource, or group information for a single day.

- **The Weekly View** shows schedules for a provider, resource, or group for a week at a time. This view also allows you to choose which days of the week you want to display.

- **The Monthly View** is designed to graphically show time slots for a month at a glance on a single window for a *single provider*.

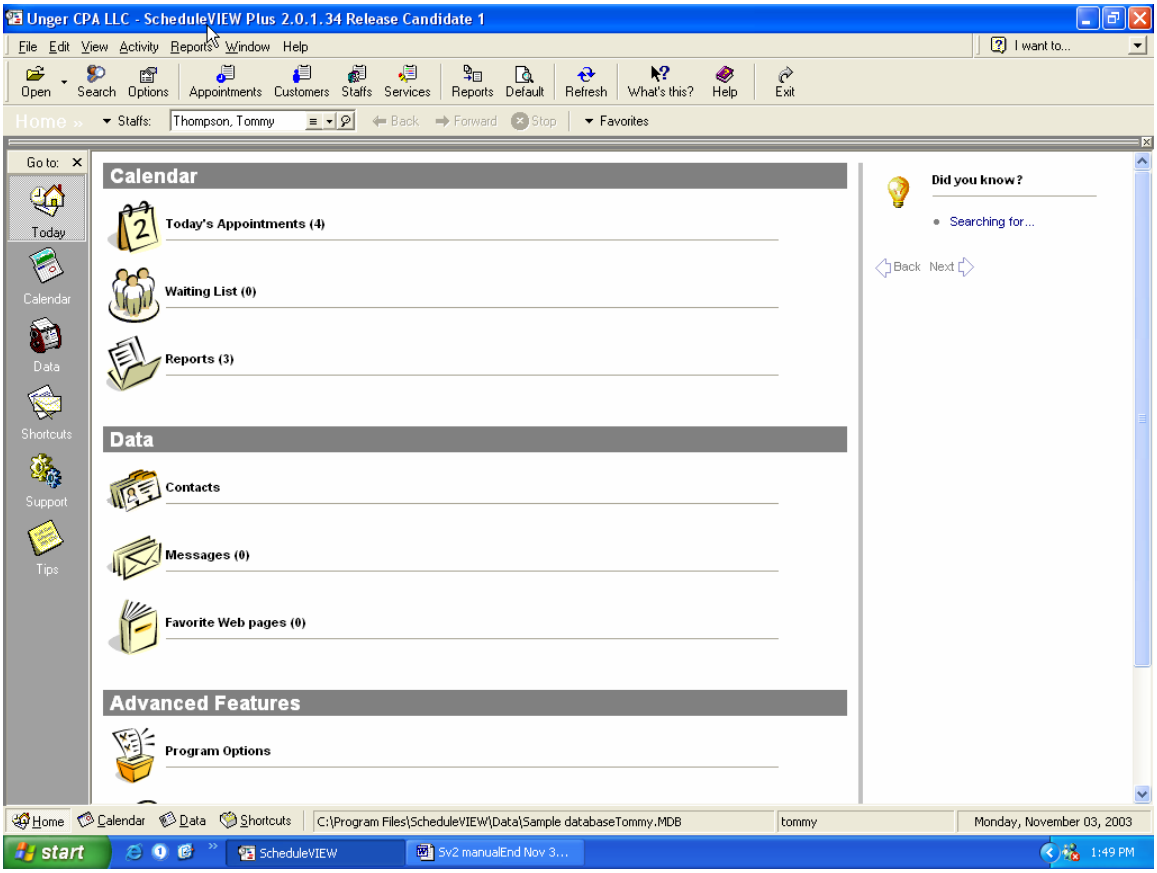
- **The Custom View** allows you to create a temporary calendar view specifically suited to your business needs. For example, you might choose to have Monday, Wednesday, and FRIDAY, two weeks from now, in this window.

To select which days you want displayed here, click on the CUSTOM TAB, then use the monthly calendar in the top right hand corner of the screen; by holding down the CTRL key and clicking on the days you want shown, you select that days show up in this screen.

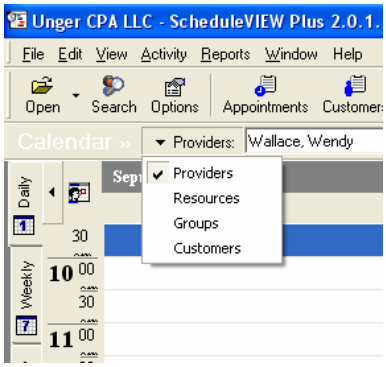
The program does not remember the dates from the last time you selected the CUSTOM TAB, so you will need to set this every day if you want to use it.

The **Today View** page is accessed by pressing the **Today** button on the **Outlook Bar**. This is a highly customizable page that may include one or more days of appointments, messages, and waiting lists; a list of frequently used reports; links to favorite websites; your favorite website displayed on the page; tips to using **ScheduleVIEW™.**

Here is one example of how the Today View page may look. Yours may be different depending on your customization of this page.

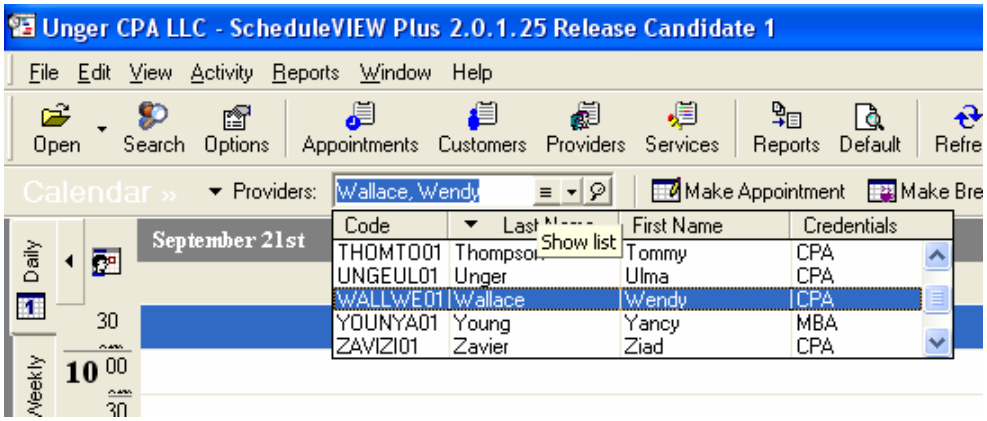


By pressing the **Calendar** button you the **Outlook Bar**, you can access four different ways of looking at your **ScheduleVIEW™** calendar: Daily, Weekly, Monthly, or Custom. Within each of these views, you can select specific Providers, specific Resources, or Groups, to further refine your views.



Changing your view from Provider, to Resources or to Groups is easy. Click on the ▼ button and select Provider, Resources, Groups or Customers from the drop-down menu.

To choose a specific Provider, Resource, or Group, click on the **show button** and choose from the list.


Unger CPA LLC - ScheduleVIEW Plus 2.0.1.25 Release Candidate 1
File Edit View Activity Reports Window Help
Open Search Options Appointments Customers Providers Services Reports Default Refre
Calendar » Providers: Wallace, Wendy Make Appointment Make Bre
Daily
Weekly
September 21st
30
10 00
Code Last Name First Name Credentials
THOMTO01 Thompson Tommy CPA
UNGEUL01 Unger Ulma CPA
WALLWE01 Wallace Wendy CPA
YOUNYA01 Young Yancy MBA
ZAVIZI01 Zavier Ziad CPA
Show list

Each of the Calendar Views consists of 4 main sections:

- **The Appointment Grid:** Which graphically shows appointments using color options.

- **The Monthly Calendar;** That highlights today's date and allows you to easily scroll back and forth between months.

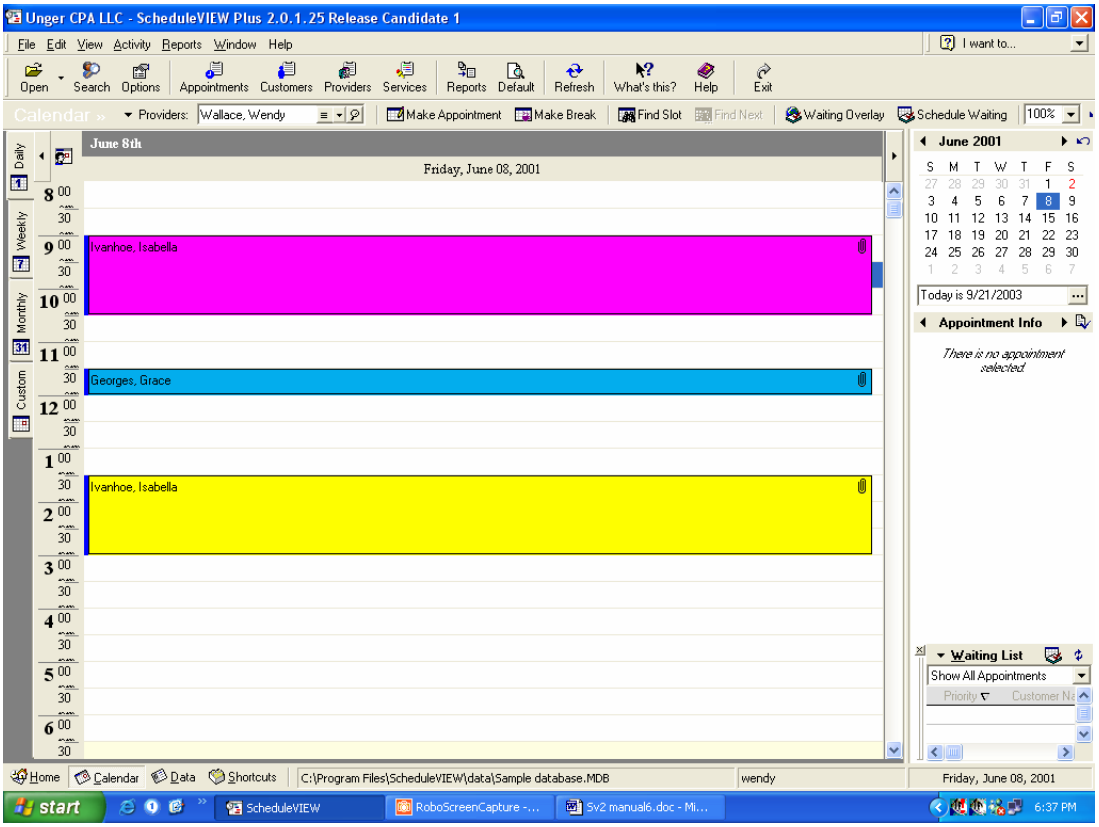
- **The Appointment Info Pane:** Which brings up additional information on the appointment simply by selecting that appointment on the Grid.

- **The Waiting List:** Which shows customers awaiting appointments in priority order.

➢ THE DAILY VIEW

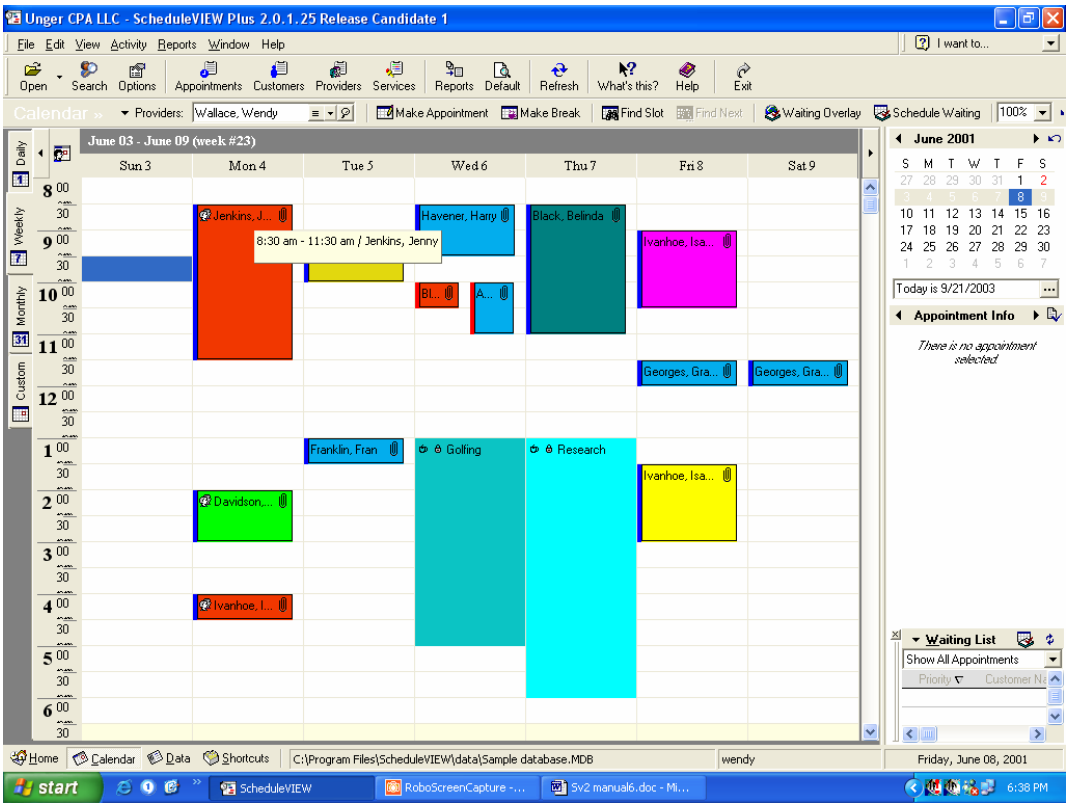
The **Daily View** shows a complete listing of the day's appointments by Provider, Resource or Group. Additionally, The Daily View allows you to add multiple columns to a provider or resource to allow for "double, triple, quadruple etc" booking.

To add an extra column, click in a time slot, and then right click with your mouse button, and choose Preferences, and then either INSERT COLUMN, or DELETE COLUMN.


Unger CPA LLC - ScheduleVIEW Plus 2.0.1.25 Release Candidate 1
File Edit View Activity Reports Window Help
I want to...
Open Search Options Appointments Customers Providers Services Reports Default Refresh What's this? Help Exit
Calendar » Providers: Wallace, Wendy Make Appointment Make Break Find Slot Find Next Waiting Overlay Schedule Waiting 100%
Daily Weekly Monthly Custom
June 8th
Friday, June 08, 2001
Ivanhoe, Isabella
Georges, Grace
Ivanhoe, Isabella
June 2001
Today is 9/21/2003
Appointment Info
There is no appointment selected
Waiting List
Show All Appointments
Home Calendar Data Shortcuts
C:\Program Files\ScheduleVIEW\data\Sample database.MDB
wendy
Friday, June 08, 2001
start
ScheduleVIEW
RoboScreenCapture -...
Sv2 manual6.doc - Mi...
6:37 PM

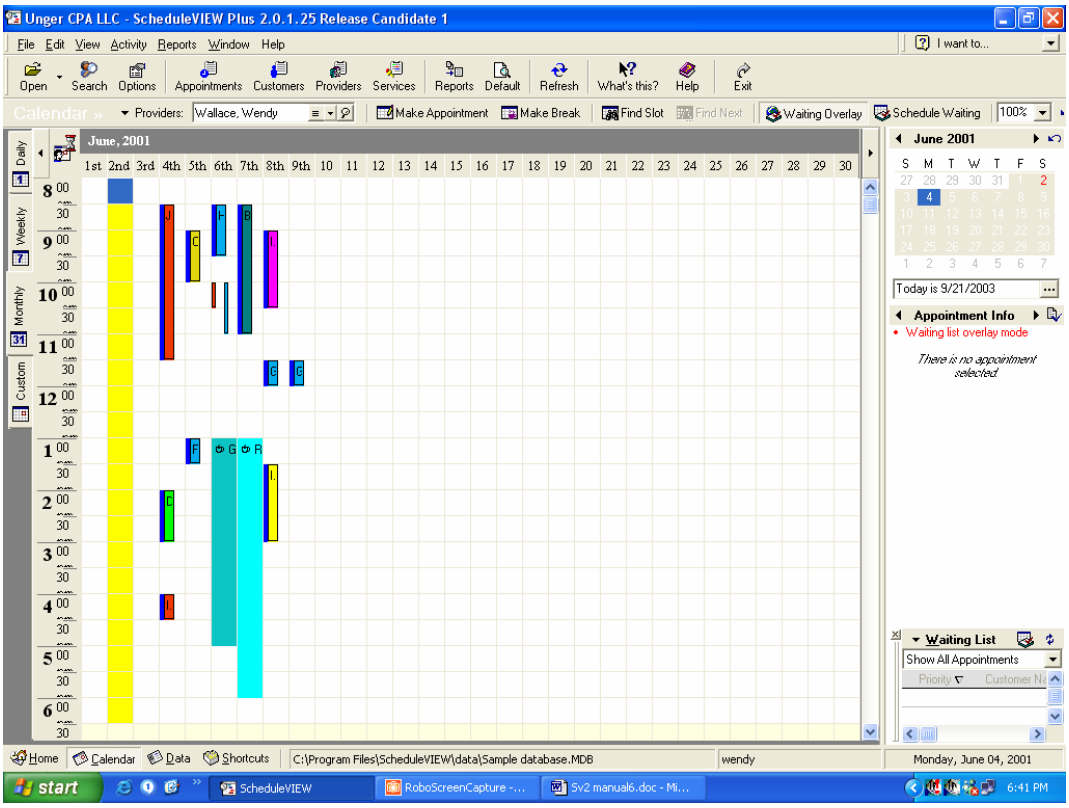
➢ THE WEEKLY VIEW

The **Weekly View** gives a view of appointments a week at a time. **ScheduleVIEW™** gives you the option of customizing your **Weekly View** to match your business schedule. To change the days of the week shown on your schedule, right click and choose **Preferences, Appointment View** and **Days of the Week.** Select or deselect each day of the week, depending on your business's work schedule.


Unger CPA LLC - ScheduleVIEW Plus 2.0.1.25 Release Candidate 1
File Edit View Activity Reports Window Help
I want to...
Open Search Options Appointments Customers Providers Services Reports Default Refresh What's this? Help Exit
Calendar » Providers: Wallace, Wendy Make Appointment Make Break Find Slot Find Next Waiting Overlay Schedule Waiting 100%
Daily Weekly Monthly Custom
June 03 - June 09 (week #23)
Sun 3 Mon 4 Tue 5 Wed 6 Thu 7 Fri 8 Sat 9
Jenkins, J...
8:30 am - 11:30 am / Jenkins, Jenny
Havener, Harry
Black, Belinda
Ivanhoe, Isa...
Georges, Gra...
Georges, Gra...
Franklin, Fran
Golfing
Research
Ivanhoe, Isa...
Davidson,...
Ivanhoe, I...
June 2001
Today is 9/21/2003
Appointment Info
There is no appointment selected
Waiting List
Show All Appointments
Home Calendar Data Shortcuts
C:\Program Files\ScheduleVIEW\data\Sample database.MDB
wendy
Friday, June 08, 2001
start
ScheduleVIEW
RoboScreenCapture -...
Sv2 manual6.doc - Mi...
6:38 PM

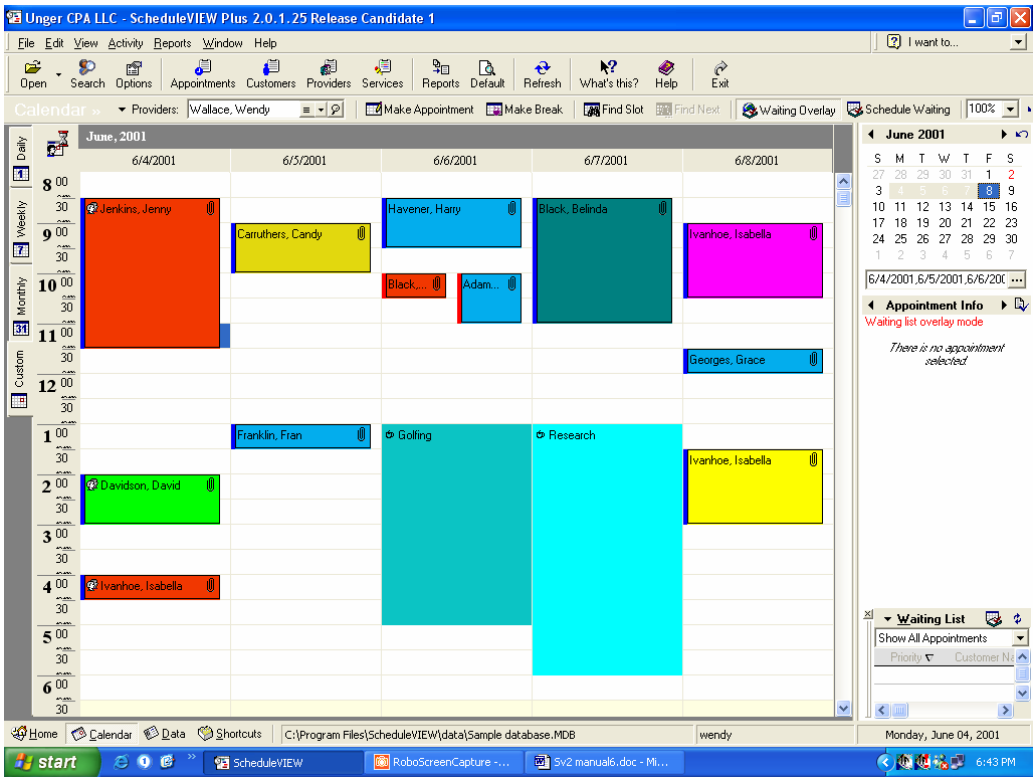
➢ THE MONTHLY VIEW

ScheduleVIEW™ also provides a month at a time view of your appointments. Please note that this works best for a *single* Provider or Resource. This option is great for an overview of your month. Looking at a monthly view for multiple Providers or Resources will result in a less viewable page.


Unger CPA LLC - ScheduleVIEW Plus 2.0.1.25 Release Candidate 1
File Edit View Activity Reports Window Help
I want to...
Open Search Options Appointments Customers Providers Services Reports Default Refresh What's this? Help Exit
Calendar
Providers: Wallace, Wendy
Make Appointment Make Break Find Slot Find Next Waiting Overlay Schedule Waiting 100%
Daily Weekly Monthly Custom
June, 2001
1st 2nd 3rd 4th 5th 6th 7th 8th 9th 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30
June 2001
S M T W T F S
Today is 9/21/2003
Appointment Info
Waiting list overlay mode
There is no appointment selected
Waiting List
Show All Appointments
Priority Customer N
Home Calendar Data Shortcuts
C:\Program Files\ScheduleVIEW\data\Sample database.MDB
wendy
Monday, June 04, 2001
start
ScheduleVIEW
RoboScreenCapture -...
Sv2 manual6.doc - Mi...
6:41 PM

➢ THE CUSTOM VIEW

The Custom View allows you to display a day, range of days, or multiple days on one View. Merely select the day from the Month Calendar. To select a range of days, days or range of days from the Month Calendar, using the hold the **Shift** key as you click on two dates – the entire range will be selected. To select multiple, individual days, hold the **Ctrl** key as you click on the dates you wish to view.



AUDITING APPOINTMENTS AND CHANGES

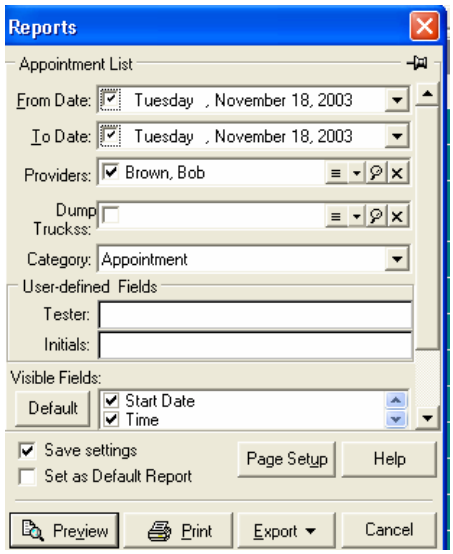
There are several reports to help you track created, changed, or modified appointments:

1. TRANSACTION REPORT

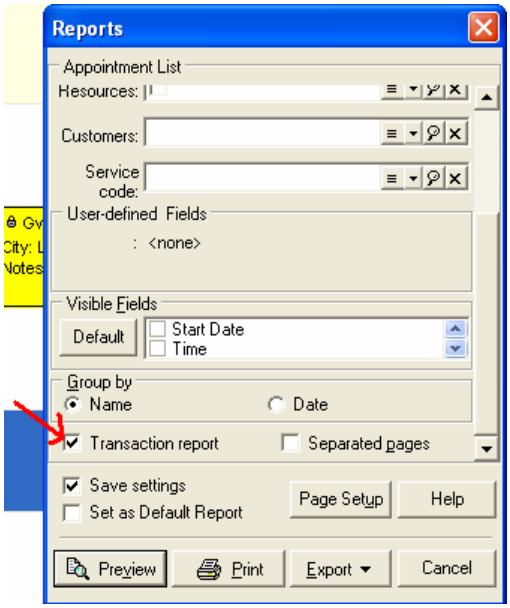
A Transaction report is unique in that it lists the Appointments that were CREATED or MODIFIED for the dates specified, not appointments that Occur on the specified dates. For example, today, you may enter 50 appointments; some appointments may be for tomorrow, next week; several weeks from now, and even next year. If you ran an Appointment list for today, and checked the box Transaction Report, the report would show you all the appointments that were entered today, and the appointment dates that they occur on.

This is great for tracking changes to the schedule in the event of computer trouble. If this report is run and printed each day you have a complete record of your appointments on file.

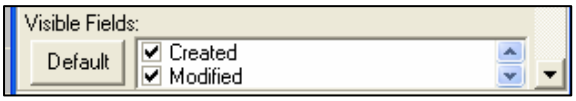
Click on 'Reports' 'Appointment List'



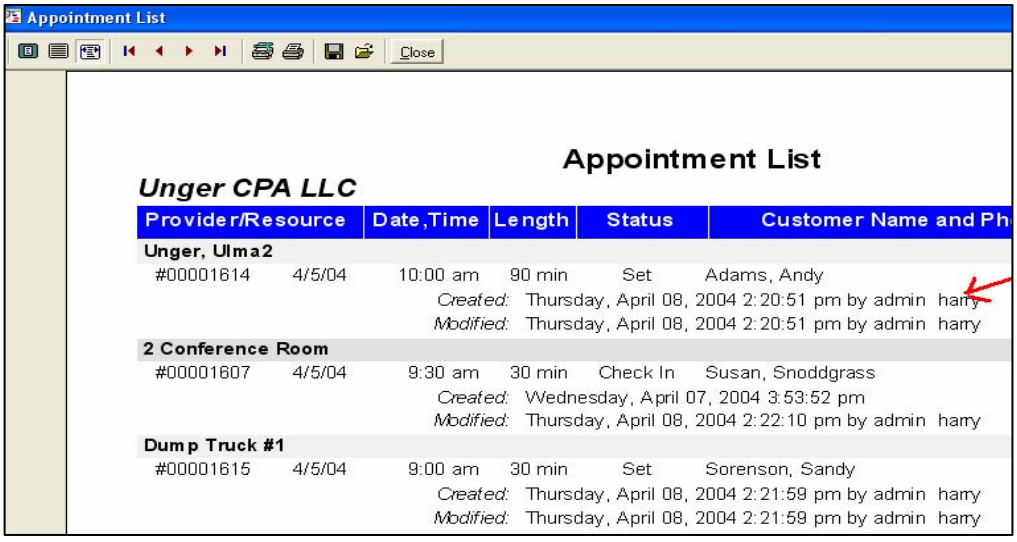
Select appointments within a From and/or To Date range.
Select appointments with specific Providers.
Select appointments with specific Resources.
Select appointments with specific Categories.



Check 'Transaction Report'



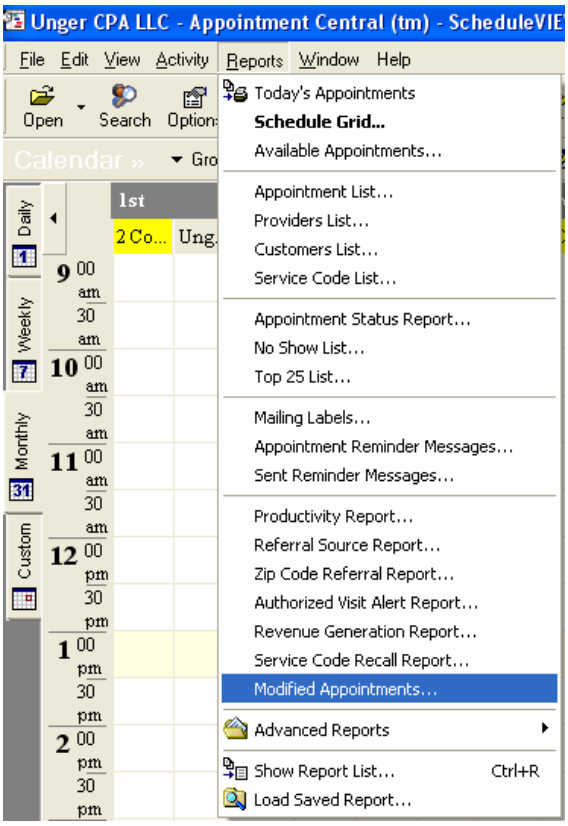
Tracking: To track when an appointment was made or changed, check 'Created' and/or 'Modified'


Appointment List
Close
Appointment List
Unger CPA LLC
Provider/Resource
Date,Time
Length
Status
Customer Name and Ph
Unger, Ulma2
#00001614 4/5/04 10:00 am 90 min Set Adams, Andy
Created: Thursday, April 08, 2004 2:20:51 pm by admin harry
Modified: Thursday, April 08, 2004 2:20:51 pm by admin harry
2 Conference Room
#00001607 4/5/04 9:30 am 30 min Check In Susan, Snoddgrass
Created: Wednesday, April 07, 2004 3:53:52 pm
Modified: Thursday, April 08, 2004 2:22:10 pm by admin harry
Dump Truck #1
#00001615 4/5/04 9:00 am 30 min Set Sorenson, Sandy
Created: Thursday, April 08, 2004 2:21:59 pm by admin harry
Modified: Thursday, April 08, 2004 2:21:59 pm by admin harry

If you are using security and have individual logins for each employee, the transaction report will show WHO created or modified the appointments.

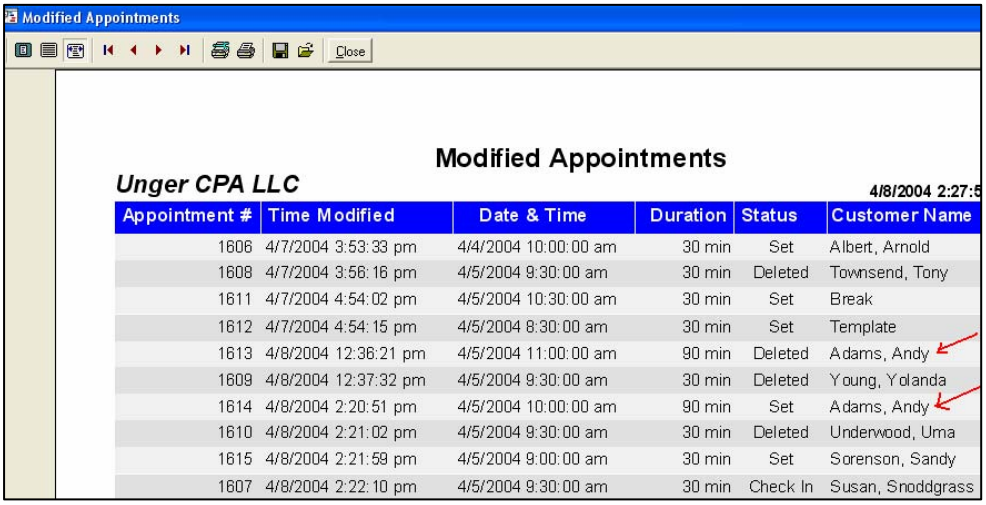
2. MODIFIED APPOINTMENT REPORT

Modified Appointment Report lists the Status of the Appointments that were CREATED or MODIFIED for the dates specified which allows you to track changes. (If you ran an Appointment list for today, and checked the box Transaction Report, the report would show you all the New Appointments that were entered today, and the dates they occur.)



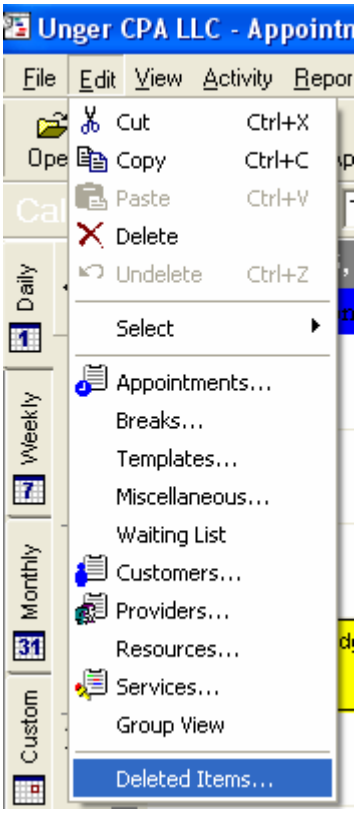
Click on 'Reports' 'Modified Appointments'

The Modified Appointment Report will show each and every modification, even if the changes are for the same customer on the same day.



Appointment #	Time Modified	Date & Time	Duration	Status	Customer Name
1606	4/7/2004 3:53:33 pm	4/4/2004 10:00:00 am	30 min	Set	Albert, Arnold
1608	4/7/2004 3:56:16 pm	4/5/2004 9:30:00 am	30 min	Deleted	Townsend, Tony
1611	4/7/2004 4:54:02 pm	4/5/2004 10:30:00 am	30 min	Set	Break
1612	4/7/2004 4:54:15 pm	4/5/2004 8:30:00 am	30 min	Set	Template
1613	4/8/2004 12:36:21 pm	4/5/2004 11:00:00 am	90 min	Deleted	Adams, Andy
1609	4/8/2004 12:37:32 pm	4/5/2004 9:30:00 am	30 min	Deleted	Young, Yolanda
1614	4/8/2004 2:20:51 pm	4/5/2004 10:00:00 am	90 min	Set	Adams, Andy
1610	4/8/2004 2:21:02 pm	4/5/2004 9:30:00 am	30 min	Deleted	Underwood, Uma
1615	4/8/2004 2:21:59 pm	4/5/2004 9:00:00 am	30 min	Set	Sorenson, Sandy
1607	4/8/2004 2:22:10 pm	4/5/2004 9:30:00 am	30 min	Check In	Susan, Snoddgrass

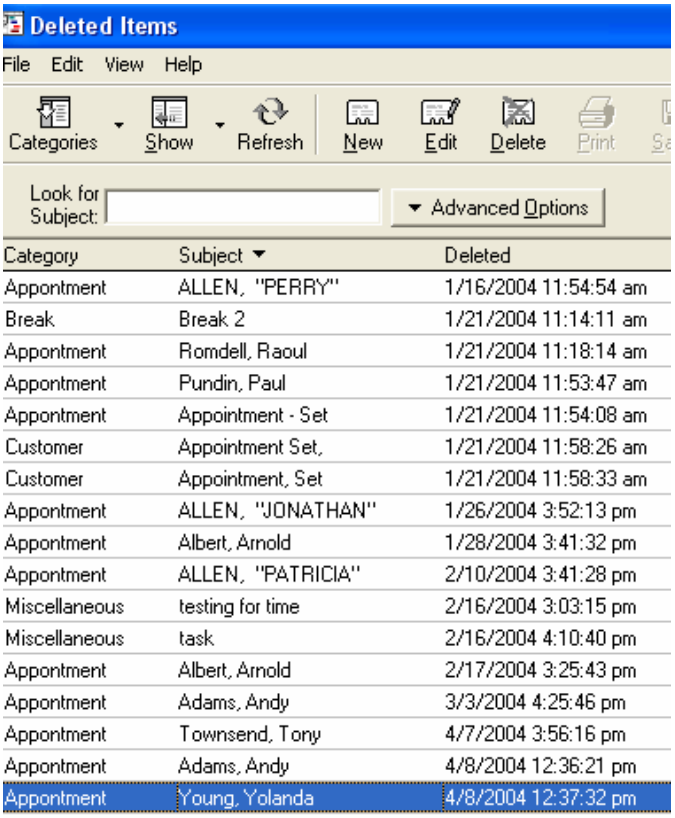
3. DELETED APPOINTMENTS



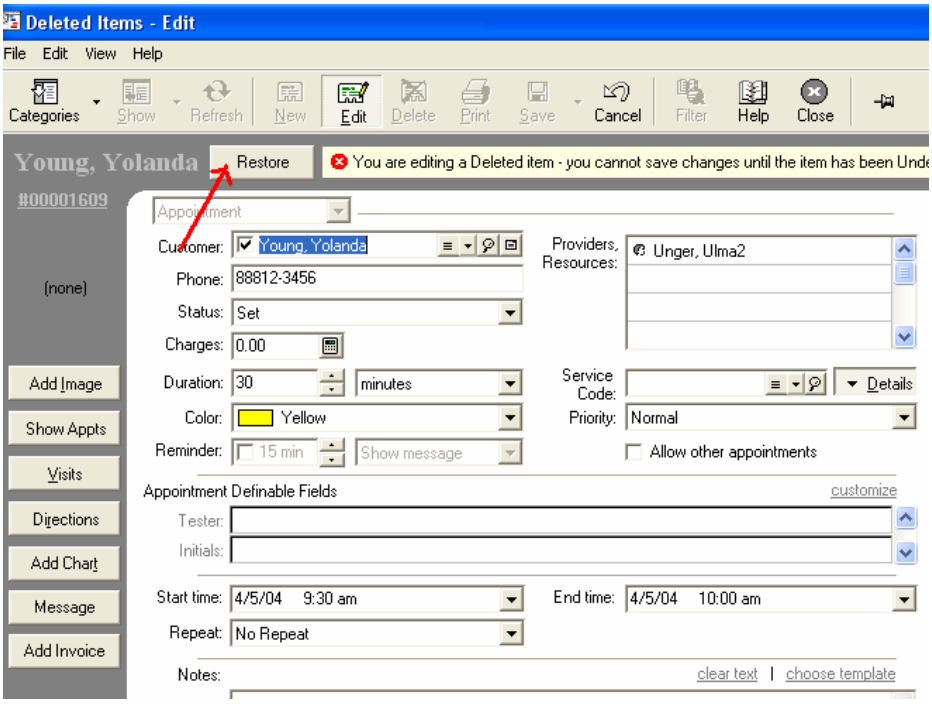
You may retrieve appointments mistakenly deleted by clicking on 'Edit' 'Deleted Items'

A list of the deleted appointments will come up.

To view the original appointment, double-click on it.

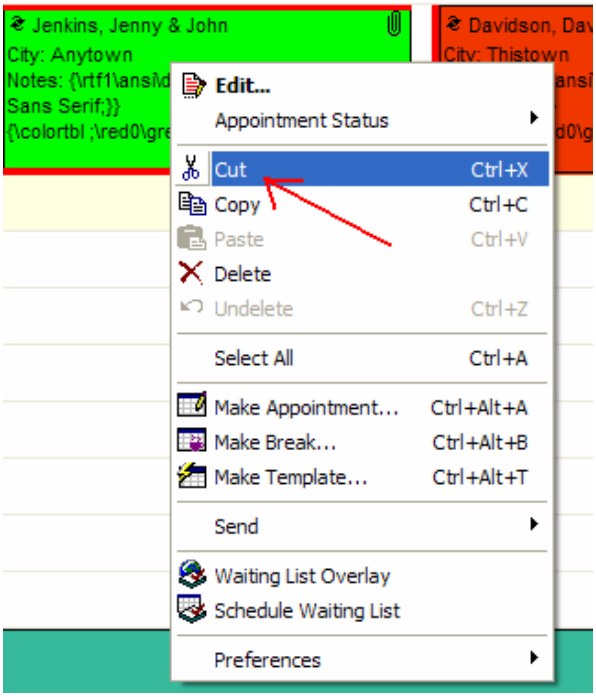


Category	Subject	Deleted
Appontment	ALLEN, "PERRY"	1/16/2004 11:54:54 am
Break	Break 2	1/21/2004 11:14:11 am
Appontment	Romdell, Raoul	1/21/2004 11:18:14 am
Appontment	Pundin, Paul	1/21/2004 11:53:47 am
Appontment	Appointment - Set	1/21/2004 11:54:08 am
Customer	Appointment Set,	1/21/2004 11:58:26 am
Customer	Appointment, Set	1/21/2004 11:58:33 am
Appontment	ALLEN, "JONATHAN"	1/26/2004 3:52:13 pm
Appontment	Albert, Arnold	1/28/2004 3:41:32 pm
Appontment	ALLEN, "PATRICIA"	2/10/2004 3:41:28 pm
Miscellaneous	testing for time	2/16/2004 3:03:15 pm
Miscellaneous	task	2/16/2004 4:10:40 pm
Appontment	Albert, Arnold	2/17/2004 3:25:43 pm
Appontment	Adams, Andy	3/3/2004 4:25:46 pm
Appontment	Townsend, Tony	4/7/2004 3:56:16 pm
Appontment	Adams, Andy	4/8/2004 12:36:21 pm
Appontment	Young, Yolanda	4/8/2004 12:37:32 pm



To put the appointment back into your schedule click on 'Restore'

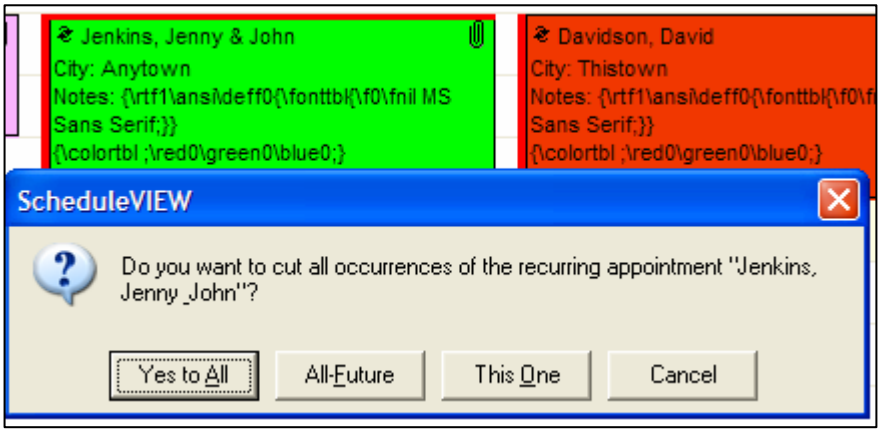
MOVING YOUR APPOINTMENTS

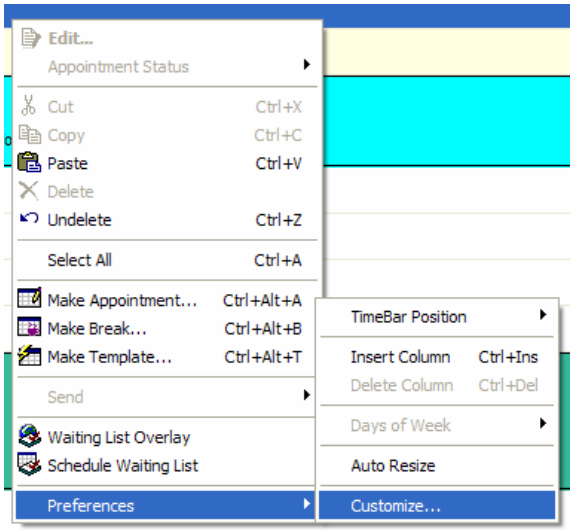


For a quick way to move an appointment when a customer calls in:

You can right click, Cut or Copy, and then Paste appointments:

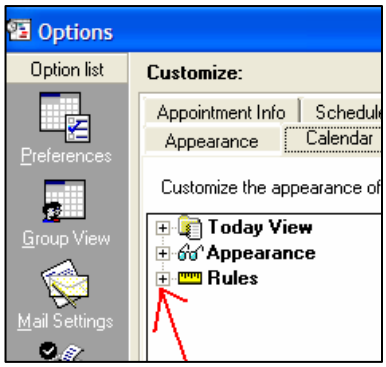
If this is a repeating appointment, you get the option of which appointments you want to cut/copy and paste.

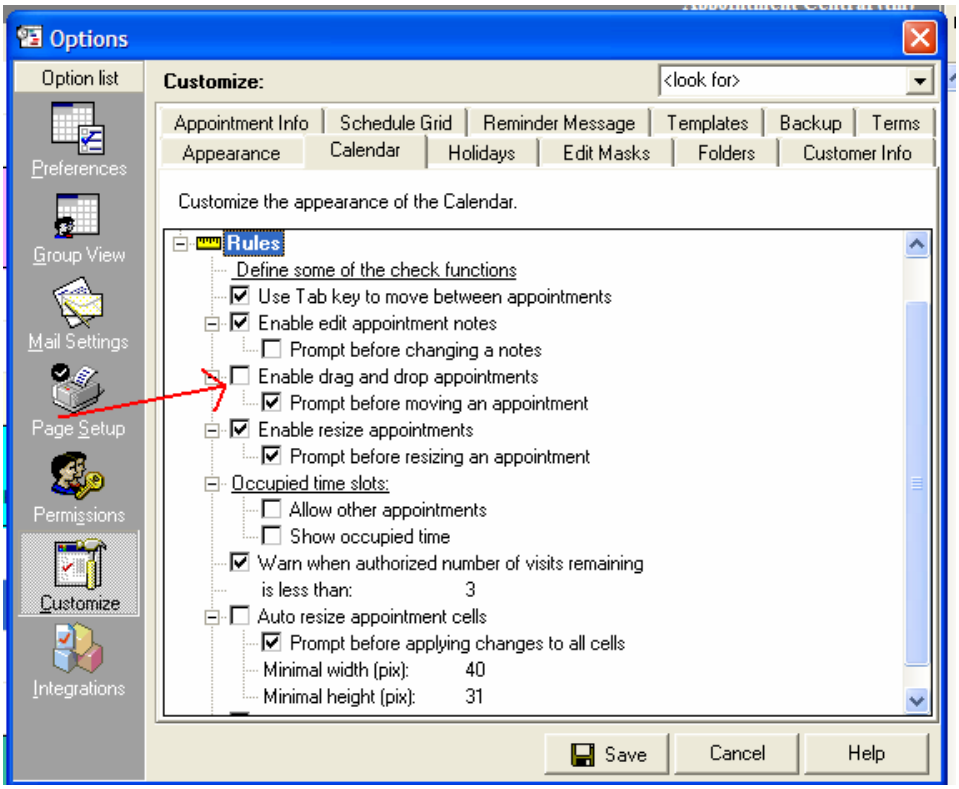




You can also Drag and Drop appointments by left clicking and holding down the mouse as you drag the appointment to its' new location.

To turn this option on or off:
Right click and choose 'Preferences' and 'Customize'





Left click on the + sign next to 'Rules' under the 'Calendar' tab.

If you choose to 'Enable drag and drop appointments' we highly recommend you also choose 'Prompt before moving an appointment' to prevent accidental appointment changes.

FINDING THE NEXT AVAILABLE TIMESLOT

Looking for a quick way to find the next available appointment for a customer?

Select **Activity** from the Main Menu and then **Find Open Time Slot.**

Here's Another Way To Do It!

Press Ctrl + F

Or use the Find Open Time Slot button on the ScheduleVIEW™ toolbar.

This brings up the **Find Open Time Slot Window** where you can chose specific parameters for the appointment.

Enter the amount of time needed for the appointment in minutes or hours and the preferred time zones, each one separated by a comma.

Selecting **Advanced Options** brings up another window that allows the entry of even more specific parameters.

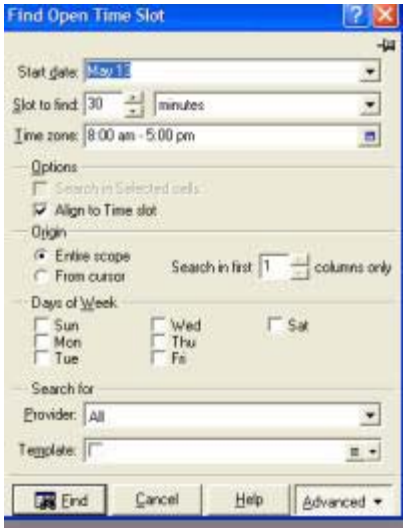
Selecting **Entire Scope** will search from today forward.

Selecting **From Cursor** will search from where your curser is, forward: For instance, you can click on a date one month from now to begin the search there.

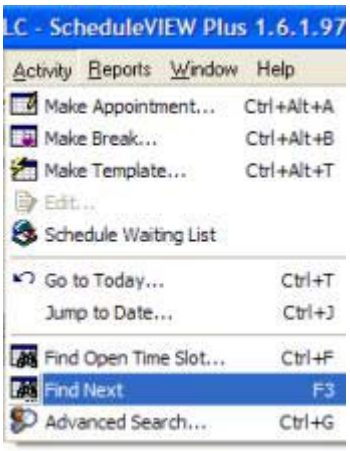
Search in first X columns only will ensure that you are only searching for open time slots in the first x columns that represent your primary booking columns ***if*** you use extra columns for multiple booking.

Days of the Week will specify which days to search on.

Provider will allow you to select a specific Provider for this appointment.



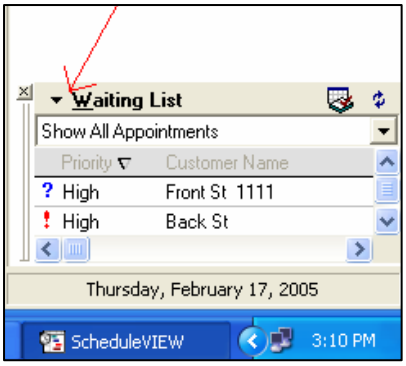
Template will allow you to search for blocked off template times for this appointment.



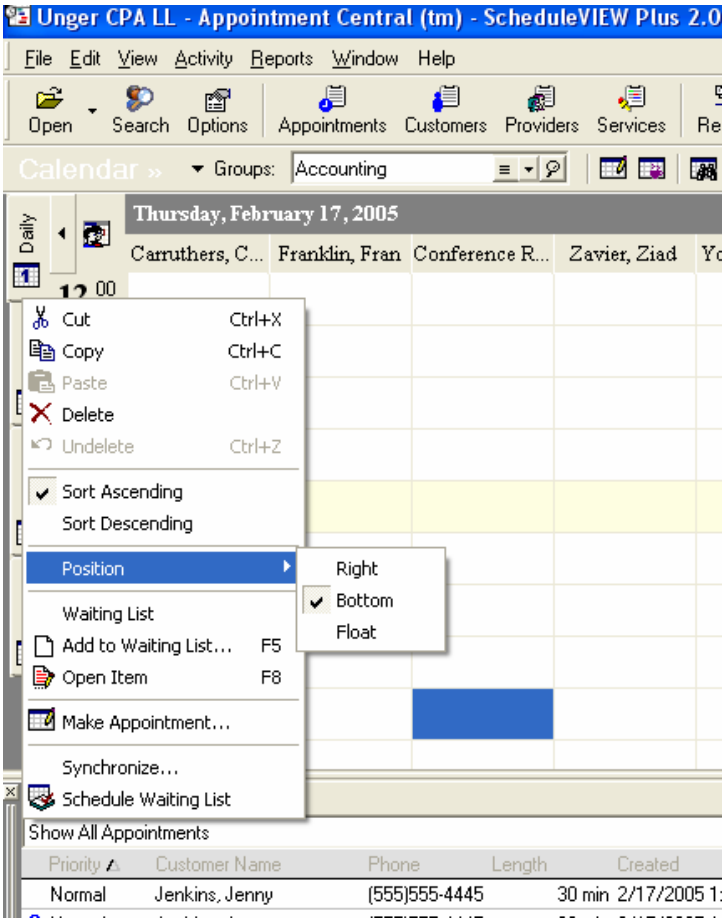
If the first appointment found is not suitable for the customer, select **Activity** from the Main Menu and then **Find Next** (or press the **F3** key) to continue scrolling through available time slots until a suitable time is found.

WAITING LISTS

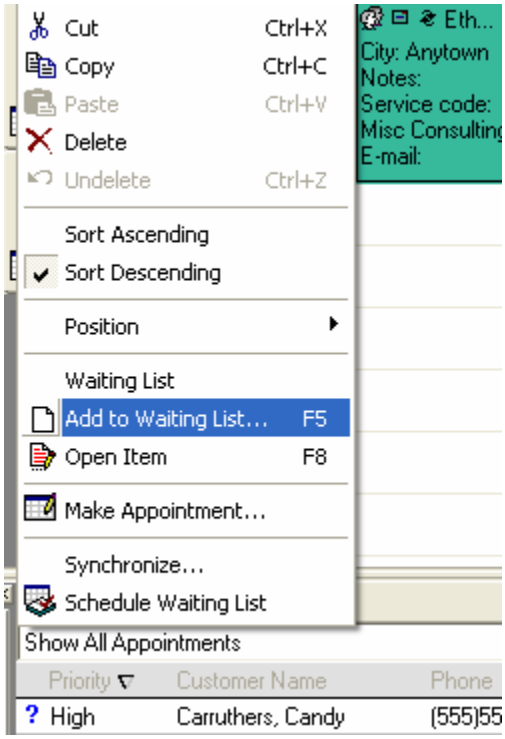
ScheduleVIEW™ has a comprehensive system for managing Waiting Lists. Waiting Lists are those requests for the next available appointment due to cancellations or other factions. Your Waiting List appears on the Calendar Views.



Clicking on 'Waiting List' gives you a popup menu:



Then clicking on the word "Position" lets you choose where the waiting list is displayed; your choices are at the bottom center, under the main calendar, or in the bottom right hand corner. (for this example we have it on the bottom)

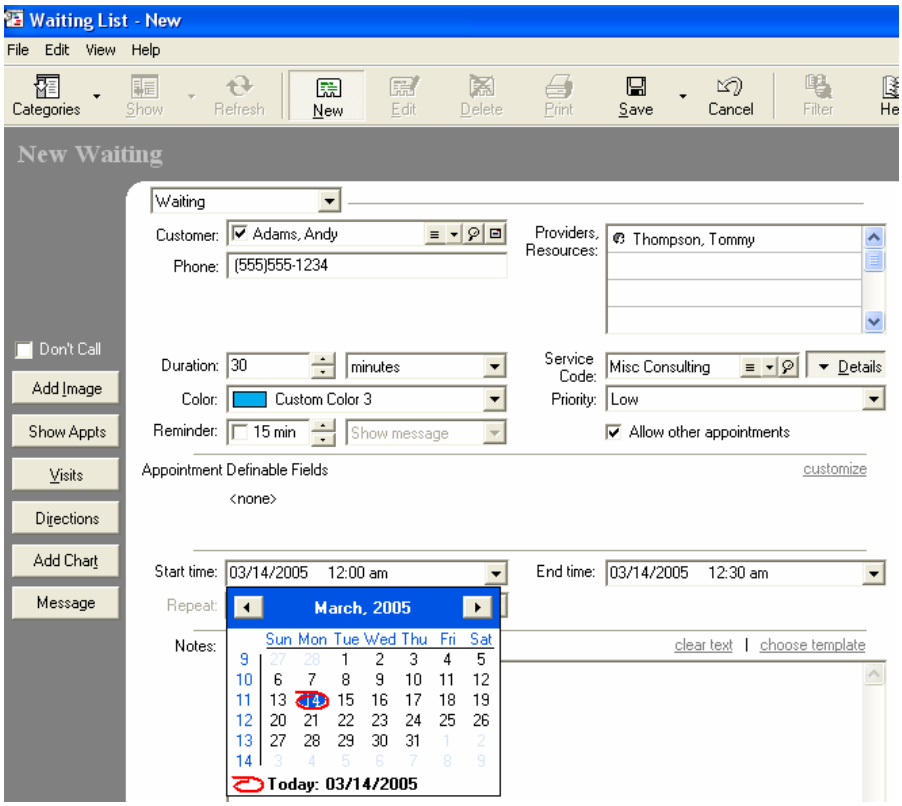


Click on "Waiting List" , and choose 'Add to Waiting List'

Enter all of the information just as you would when making an appointment.

By clicking on the drop-down arrows by 'start time' and 'end time' you can choose a date if a specific day is requested.

Click 'Save' when done



Now you can schedule the waiting list customers as appointments come available by 'dragging and dropping' or 'cutting and pasting'.

Waiting List

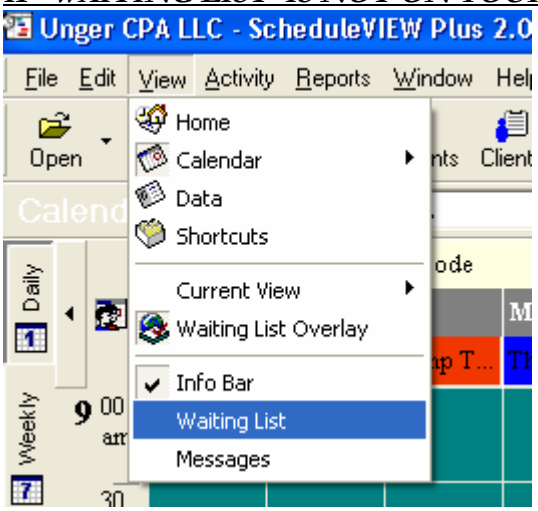
Show All Appointments

Priority	Customer Name	Phone	Length	Created	All Attendees	Servic
? High	Carruthers, Candy	(555)555-8888	30 min	03/08/2005 4:42:59 pm	none	PR01
Normal	Black, Belinda	(555)555-1111	30 min	03/08/2005 4:40:59 pm	THOMT001	ST01
! Low	Adams, Andy	(555)555-1234	30 min	03/08/2005 4:40:41 pm	UNGEUL01	ST01

The ? sign means that there is an unknown parameter in the waiting appointment (for example there is no Provider, or there is no Start Date/Time defined)

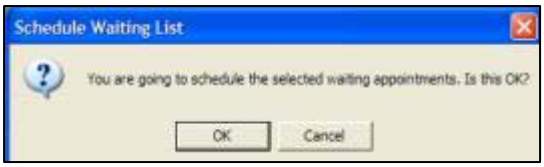
The ! means that there is a conflict - the Start Date is out of the selected time period, or Start Date is a holiday, or the Time Slot is already booked...

IF 'WAITING LIST' IS NOT ON YOUR SCREEN:



Click on 'View' 'Waiting List' If there is a check box by the phrase "Waiting List", then the waiting list is enabled, and is either at the bottom center, under the main calendar or in the bottom right hand corner of the screen. (If there is no check mark, then click on the phrase "Waiting List" and a checkmark will be placed next to it.)

Automatically Schedule Waiting List. To schedule appointments automatically from your Waiting List, Click on the Automatic Schedule Button. The following window will pop up to confirm that you wish to schedule the Waiting List. Press **OK** to continue.



ScheduleVIEW™ will present the appointments waiting to be scheduled.

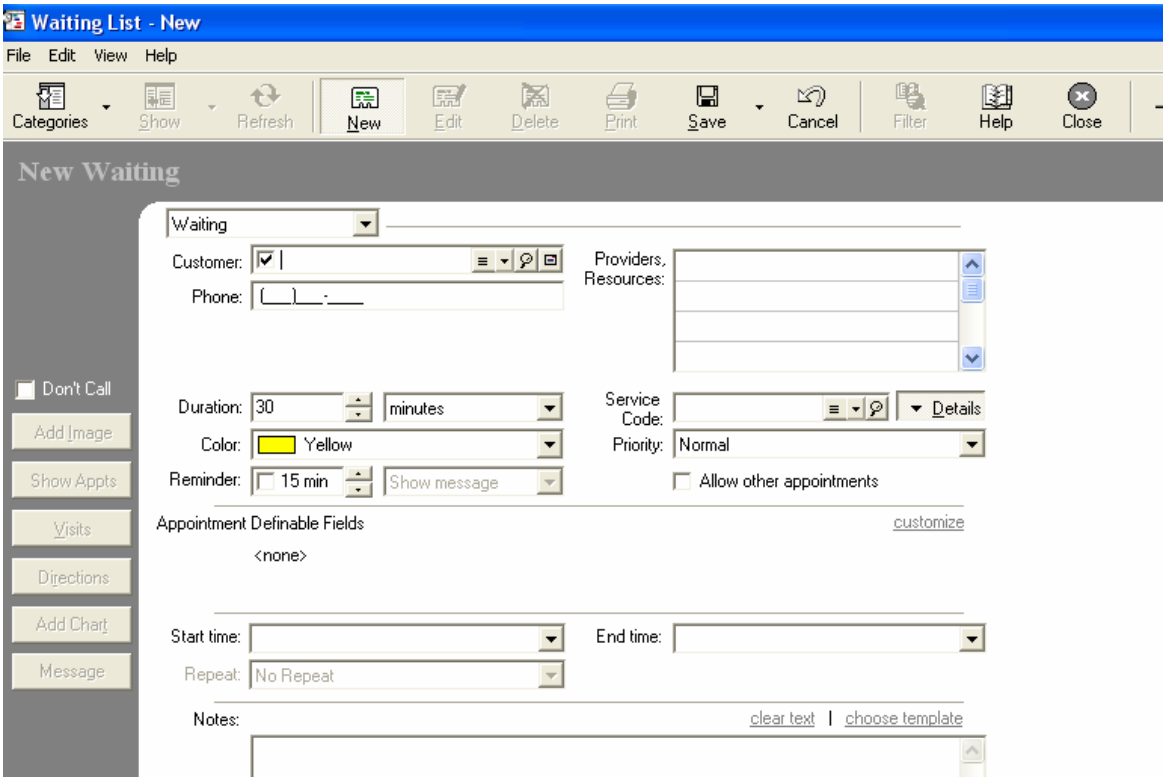
Select each appointment by placing a check mark and press OK to proceed. Press Cancel to abort the scheduling process.

ScheduleVIEW™ automatically schedules all the selected appointments on your list. If there are conflicts you will get an error message in this window.

Schedule Waiting List
The list below shows the waiting appointments that haven't been scheduled. Select the appointments you want to schedule and click Ok to do this.
Appointment
Error
5/6/2003, 12:00 pm-12:30 pm ...
Out of selected providers
5/6/2003, 12:00 pm-12:30 pm ...
Ok
Cancel
Properties...

Here's Another Way To DO It!

The Waiting List will always be present in the lower right hand corner of your calendar. Simply click on a waiting list entry to edit; delete; or schedule. Or right click to add a new Waiting List entry.



Customer: A ☑ next to the name indicates that the customer is already in your database. Simply start typing and information on that customer will fill in on the Waiting List Form.

To select a customer name from the database, select from the scrolled down list by pressing the ▼ button. A list of all the customers in the database will appear. By typing the first letters of the name and then pressing the ▼ button, you will reach that alphabetical position in the customer database. Just highlight a name to select. To add a new customer to the database, press the ▼ button and select **New Customer**, or Press the **F5** key. To edit a customer's information in the database, press the ▼ button and select **Edit Customer**, or Press the **F8** key

Pressing the magnifying glass icon will bring up a search menu to search for customer names in the database.

Pressing the envelope icon will allow you to directly email the customer, provided you have set up **ScheduleVIEW™** for email access.

Providers, Resources: The Providers and Resources who will have this break on their schedule.

Duration: The amount of time for the break in minutes, hours, or days.

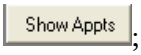
Service Code: You can optionally set up a Service Code to track breaks in reports.

Color: The color of the break as it appears in the Daily Calendar.

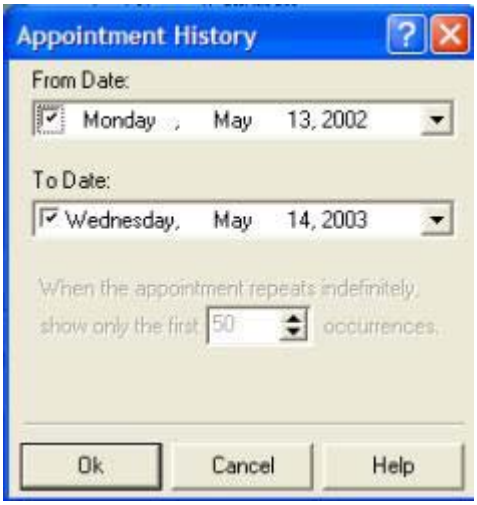
Priority: Set a priority for the break, normal, low or high

TRACKING APPOINTMENTS

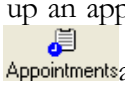
There are three great ways to find your customer's next appointment, or to review a customer's appointment history:

Double-click on any of the customer's appointments (or you can click on 'Customers' at the top of your screen and double-click on the name of your customer), then click on the Show Appts button 

; The following popup window will appear:

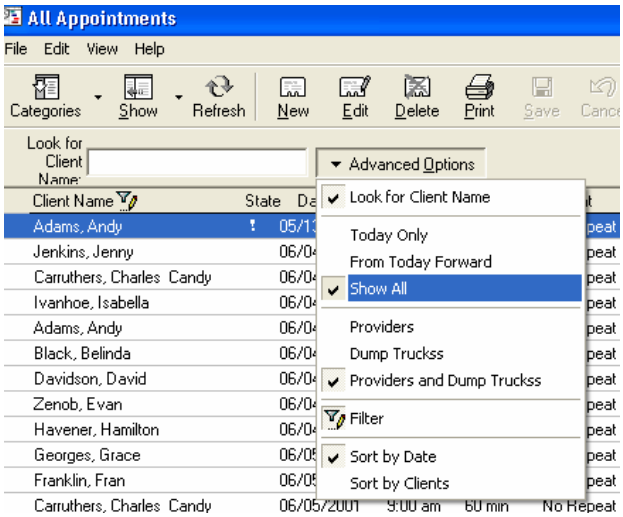


Select **From Date** and **To Date** for the Appointment History and OR select a **From Date** and enter in the number of occurrences you wish to view for recurring appointments with no end date. Click **OK** to produce the **Appointment Report.** **Leave the boxes UNCHECKED to view ALL appointments.

If you need to look up an appointment of a customer not in your database, you may also click on the 'Appointments' icon 

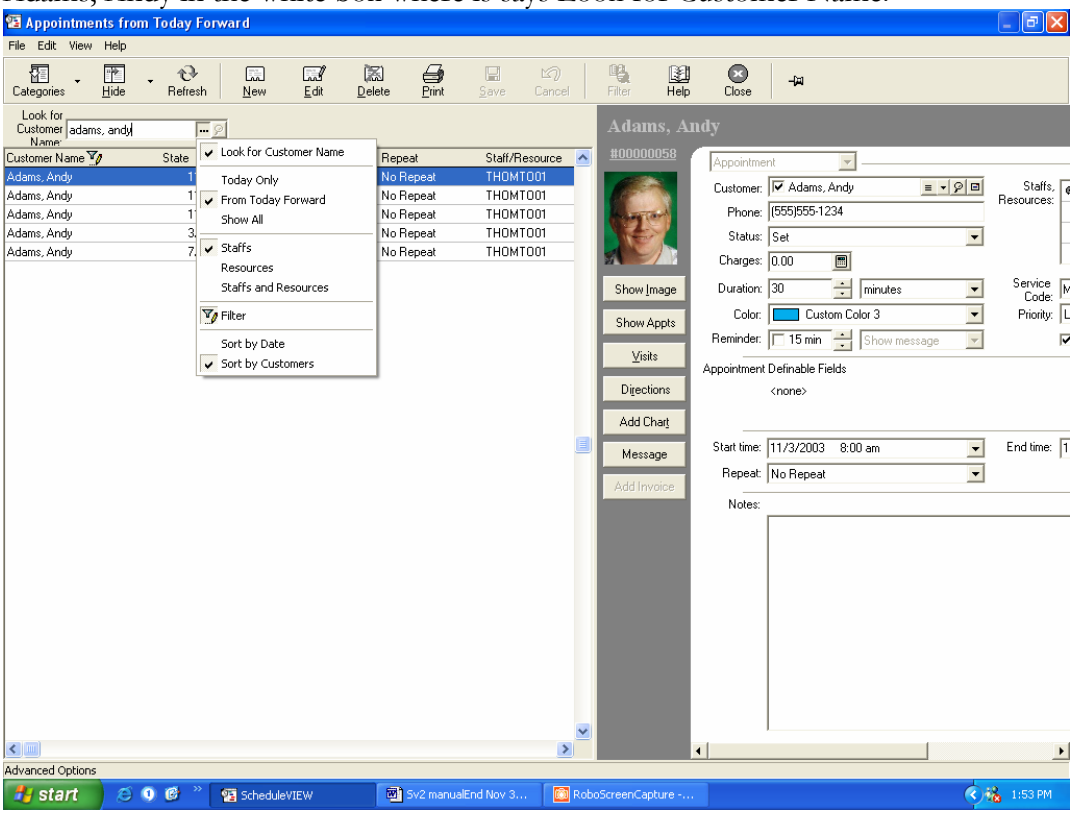
at the top of your screen.

This will show your most recent appointments. To view all of them, click on 'Advanced Options' and click on 'Show All'



ScheduleVIEW™ provides you even more ways to look at and track your appointments:
Ring, Ring, it's the telephone ringing and Andy Adams is on the phone, he knows he has some upcoming appointments, but doesn't remember when and wants you to tell him when the upcoming appointment are. EASY AS PIE with ScheduleVIEW™.

Just click on 'EDIT' 'APPOINTMENTS' click on the box with the ... or on Advanced Options, choose From Today Forward; and make sure the FILTER box is checked; and type in Adams, Andy in the white box where is says Look for Customer Name.



You can see that Andy Adams has five up coming appointments. On the actual screen, you could click to get rid of the drop down OPTIONS box that is covering the dates and times of the appointment and actually see the times of the future appointments.

- Look for Customer Name – Search by Customer Name
- Today Only – Shows only today's appointments.
- From Today Forward – Shows today's appointments and future appointments.
- Show All – Shows all appointments past, today, future.
- Providers
- Resources
- Providers and Resources
- Filter-- **HINT: Always make sure this is checked.**
- Sort by Date
- Sort by Customer

LEAD SHEETS, SUPERBILLS, ENCOUNTER FORMS, WORK ORDERS, ETC

Sending Appointment Reminders

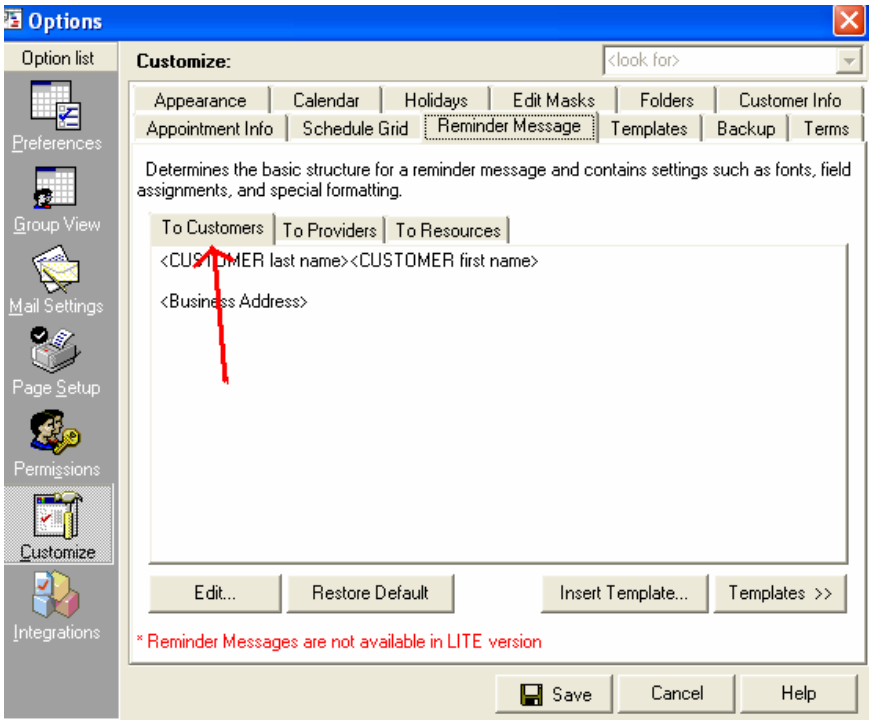
To Email:

****1. Your email account must be a SMTP Server, and a POP3 account (Note: AOL is not compatible)
****2. Some ISP's place restrictions on sending email through their servers, or do not allow 3rd party programs to send email through them. You will need to check with your ISP to see if these limitations apply to your account.

(For a complete tutorial on how to setup and use Appointment Reminders, visit our online tutorials at www.scheduleview.com/learning.htm.)

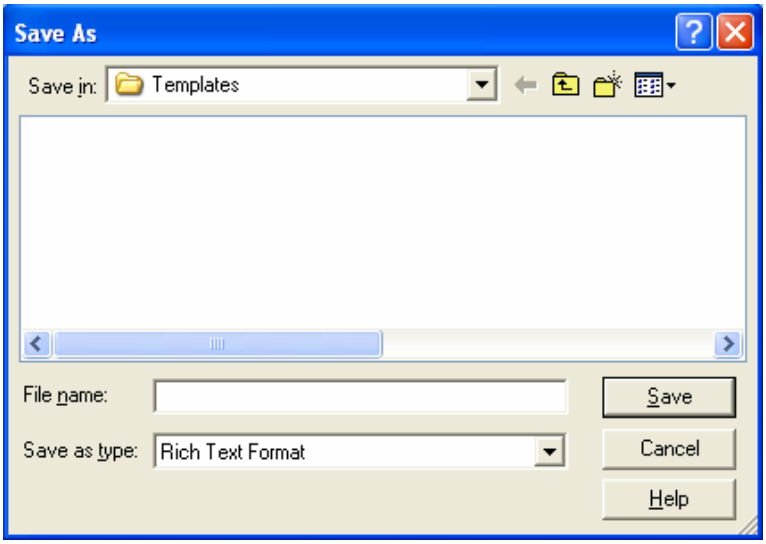
This feature allows you to merge information from your customer's database screen and appointment screen, then arrange it on a form and print for specified customers you desire for a range of dates.

Click on 'File' 'Options' 'Customize' 'Reminder Message'



Use the
'To Customers'
'To Providers'
'To Resources' depending on what the form is being used for.

Then, at the bottom of the page, click on
'Templates >>'
'Create Template'

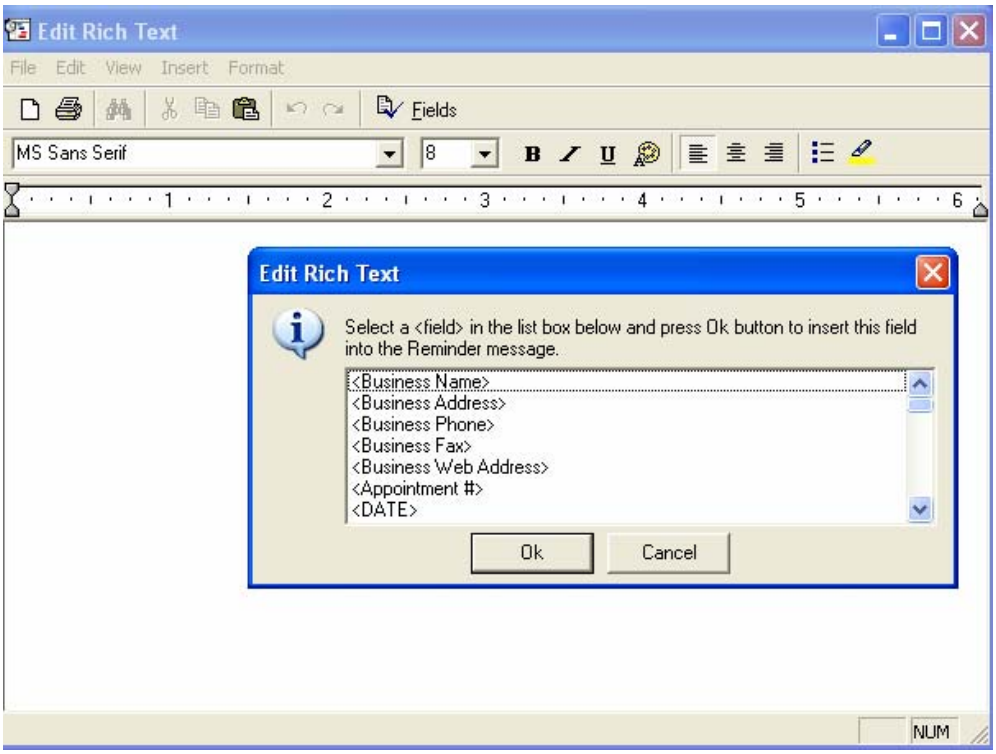


Name the template and click 'Save' this will take you to the 'Edit Rich Text' window.

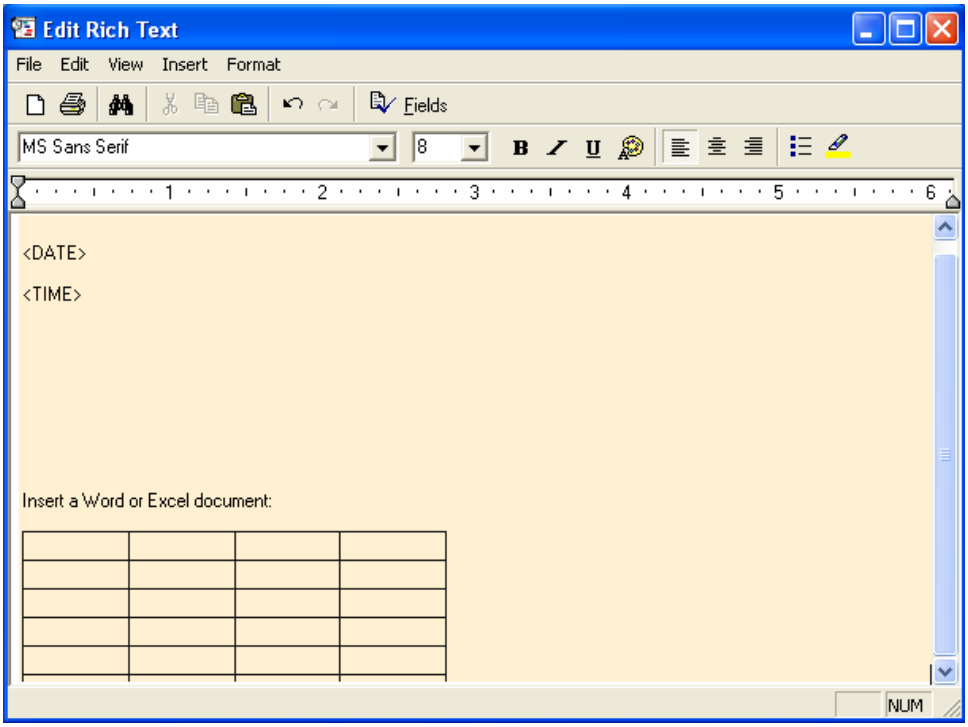
In order to add information from the customer database or appointment screen:
Move your cursor on the screen in the location you wish the information to insert.

Click on 'Fields'

which is located on the menu bar



This gives you a drop-down list of fields you may pull customer or appointment information from.
Highlight your choice and click 'OK' and the field will insert.
Repeat this for all the fields you wish.

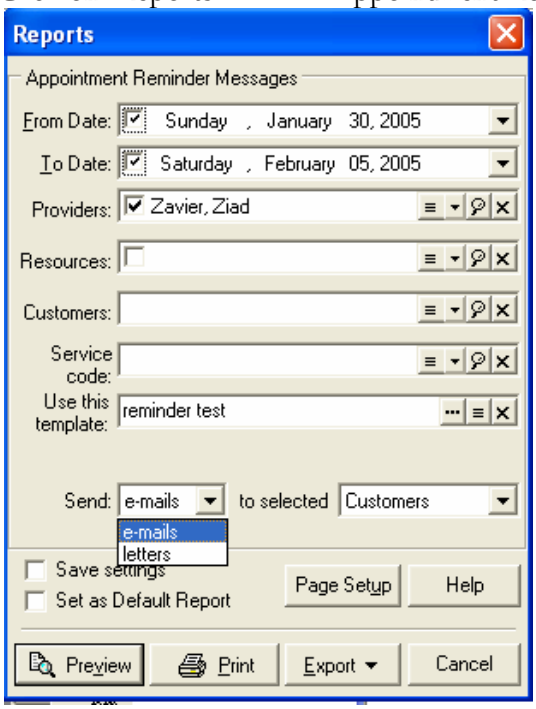


** You may type directly on the template also.

* You may copy and paste from a Word or Excel document as well.

When you are finished Click 'File' 'Save and Exit' 'Save'

Now anytime you want to use this report, from the ScheduleVIEW™ calendar:
Click on 'Reports' 'Appointment Reminder Messages'



Select the parameters you need

'Send' choose 'Letters' or 'Emails'

'To Selected' choose 'Customers' or 'Providers' or 'Resources'

'Use this Template' click on the ... button and browse to the template you just created.

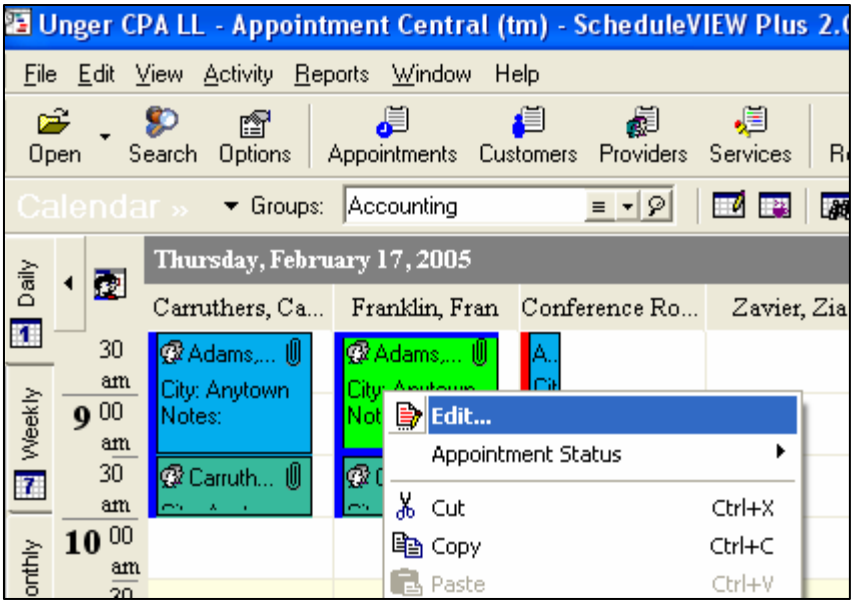
You can 'Set as Default Report' for convenience

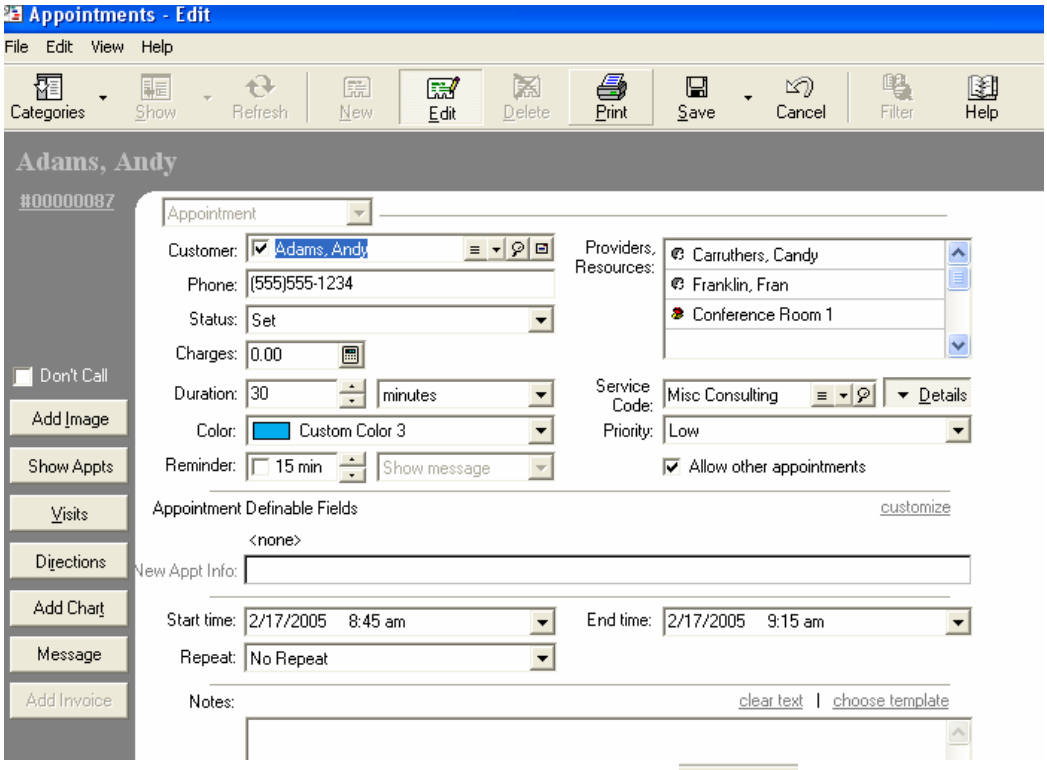
Click 'Preview' to double-check your document before using.

You can also print for a single customer:

Here's Another Way To Do It!

Right click on an appointment and choose 'Edit'





When in the Customers Edit screen hit print

and your default form will print for this one customer. (This feature will only work if a default form was assigned 'To Customer' as explained at the beginning of this section)

Working With Databases

WORKING WITH DATABASES

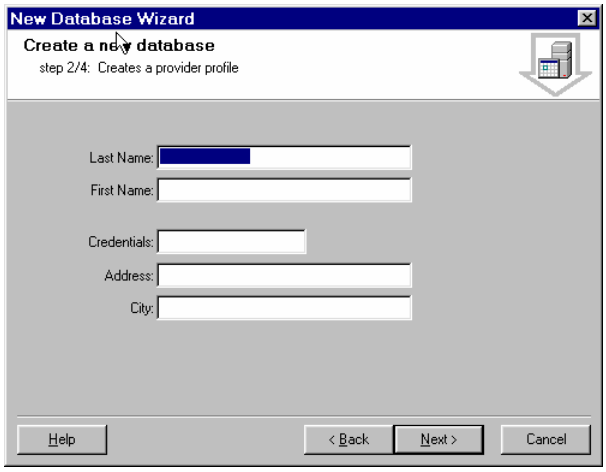
CREATING YOUR CUSTOMER DATABASE

The Create Database Wizard will walk you through the important steps in creating a new database. To access the Wizard, select **File** from the main menu and then **New Database. Or** type **Cntrl-N**.

If you create a new database without the wizard, just remember to add a "Provider or Resource" immediately after creating the database name so that you can add appointments.

There are 4 Steps in the Create Database Wizard:

1. **Give the Database a Name and Location.**



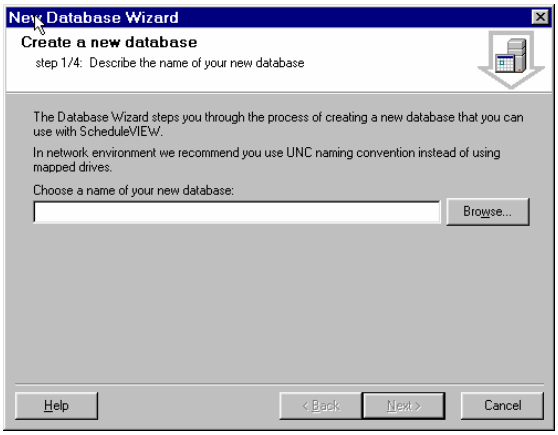
First click on the "Browse" button to find the location folder for the database and give it a file name. Type in the name of the database in the white box as a description.

Remember the file name and location of the database are especially important to remember if you are networking this program with other users or computers.

2. Create a Provider to add to the Database

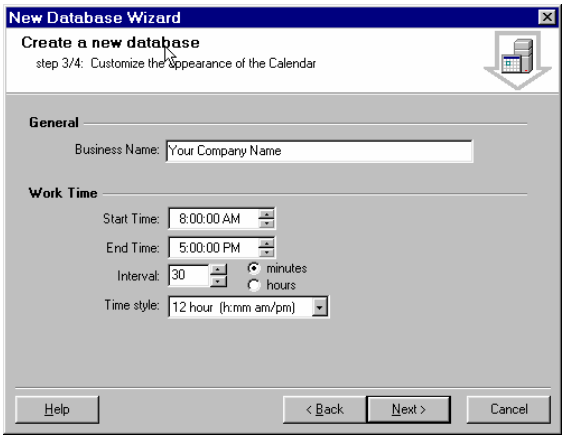
You will need to create at least the first "provider" for this database. A "Provider" is a someone in your organization who you will be scheduling appointments for with your customers.

You must enter a Last and First name here and then click **Next** to continue creating the database.


New Database Wizard
Create a new database
step 1/4: Describe the name of your new database
The Database Wizard steps you through the process of creating a new database that you can use with ScheduleVIEW.
In network environment we recommend you use UNC naming convention instead of using mapped drives.
Choose a name of your new database:
Browse...
Help
< Back
Next >
Cancel

.

3. Customize the Appearance of the Calendar



The next step in creating the database is to enter the Name of your Company or Business.

Then enter your business hours - the start and stop times of your day's appointments. Enter an Interval that is a time increment you want to display on your calendar. Choose to display by minutes or hours.

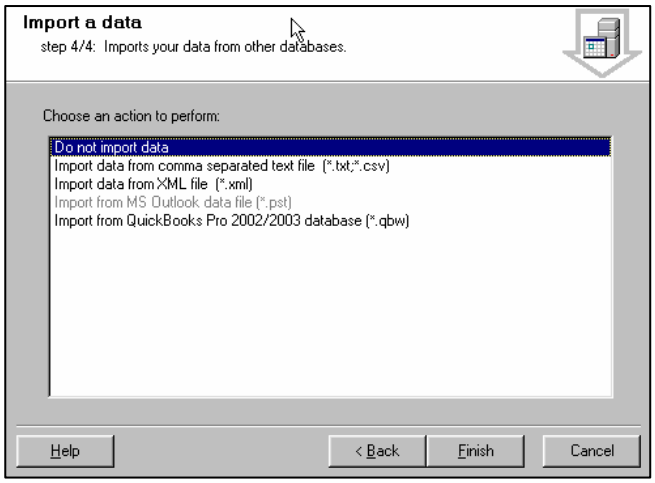
Finally enter the Time Style, choosing from 12 hour (am/pm) or 24 Hour Military Style.

4. Import Data from Other Applications.

At this point, you can decide to import or not import your data for this database from other applications or data files.

Please see the following section on Importing Data into **ScheduleVIEW™.**

If you select not to import data, clicking on **Finish** will end the Wizard. Your database is created!


Import a data
step 4/4: Imports your data from other databases.
Choose an action to perform:
Do not import data
Import data from comma separated text file (*.txt;*.csv)
Import data from XML file (*.xml)
Import from MS Outlook data file (*.pst)
Import from QuickBooks Pro 2002/2003 database (*.qbw)
Help
< Back
Finish
Cancel

IMPORTING DATA INTO ScheduleVIEW™

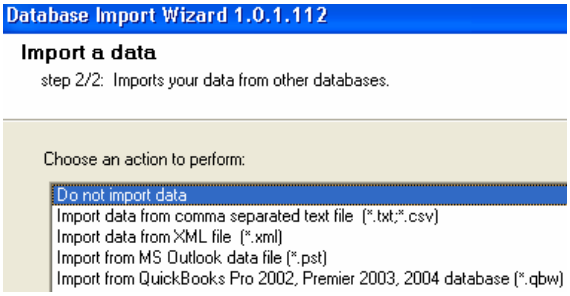
**Please note - each time you import, your database will be added. In other words, if you import 3 times you will have each customer in your database 3 times. **

ScheduleVIEW™ imports data from your existing database in standard Windows file formats such as ASCII text (.txt), comma deliminated files (crv) the commonly used ASCII text, or comma delimited files (.csv).

You can choose to import Customers, Providers, and Resources.

If you have **ScheduleVIEW™ Plus** you can also sync data from your **MS Outlook,** or **QuickBooks™** data files. See section on Quickbooks™ or MSOutlook Sync in this manual.

To begin to Import, access the Import Wizard by clicking on 'File' then 'Import'.

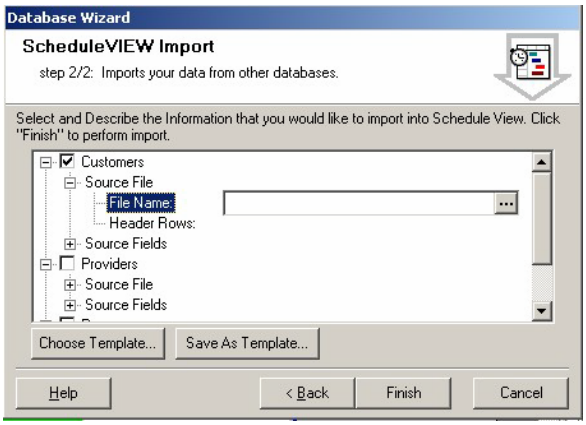

Database Import Wizard 1.0.1.112
Import a data
step 2/2: Imports your data from other databases.
Choose an action to perform:
Do not import data
Import data from comma separated text file (*.txt;*.csv)
Import data from XML file (*.xml)
Import from MS Outlook data file (*.pst)
Import from QuickBooks Pro 2002, Premier 2003, 2004 database (*.qbw)

Pick the Format of the data you are importing.

Choose either comma separated text file from applications like Word, Access, or Excel (.txt files or .csv files) or XML (.xml files).

Press **Next** to continue the Import Process or **Cancel** to leave the Wizard.

****NOTE: Using ScheduleVIEW™: If you choose to import from Quickbooks™, your customer phone numbers will not be imported, you must use the Synch feature. to bring over the phone numbers.**

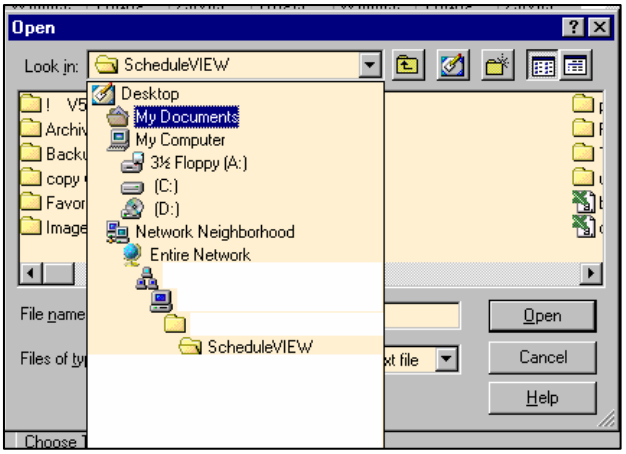


Select the File and Describe the Information You want to Import.

For this example click in the box next to Customers to add in a check mark.

Now click on the word 'File Name'

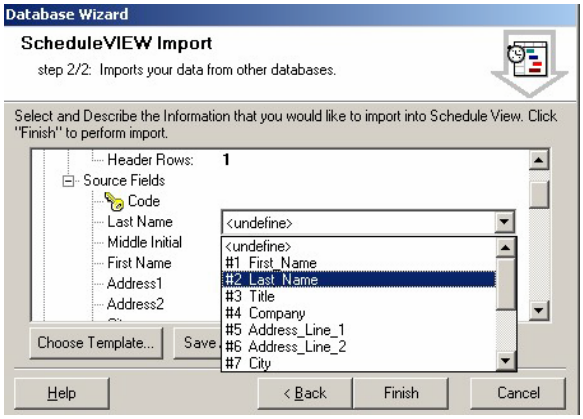
Click on the ... button.



Browse your file to import and click 'Open

Please Note: your window may look different depending on the type of file you are importing.

Put a '1' in "Header Rows".



Click each field you are importing and match it to a column in your import field. (The code field Code should be left blank.)

Select **Finish** to complete the Import Process.

Save this import process as a Template if you wish to use it again.

TROUBLESHOOTING

1. The data in fields must be listed in the same type/style: an example is if some entries are (555) 555-5555 and others are 555-555-5555, the import will not complete because some phone numbers have parenthesis and some do not. Make sure the data is formatted correctly, the most common problem areas are the Phone Number and Date of Birth fields.

2. The first and last name fields must not have any punctuation in them. This includes commas, periods, parenthesis, dashes, ampersands, etc. They may import, but errors will come up in your provider and customer lists later.

3. Narrow it down to see what field is causing trouble: import the fields a few at a time, until you find which one is unacceptable.

4. If you import incorrectly, go back and create a new ScheduleVIEWtm database and try again.

5. You may contact ScheduleVIEW™ - for a fee, our programmers can do the importing for you. Importing fee starts at $99.00. Send us a copy of your import file for an exact quote to: techsupport@scheduleview.com.

EXPORTING SCHEDULEVIEW™ DATA TO OTHER APPLICATIONS.

ScheduleVIEW™ exports data from your **ScheduleVIEW™** database to standard Windows file formats such as ASCII text (.txt), comma deliminated files (crv) the commonly used ASCII text, comma delimited files (.csv) and Extensible Markup Language (.xml). You many need to try different types to fit the application you want to work with after you export.

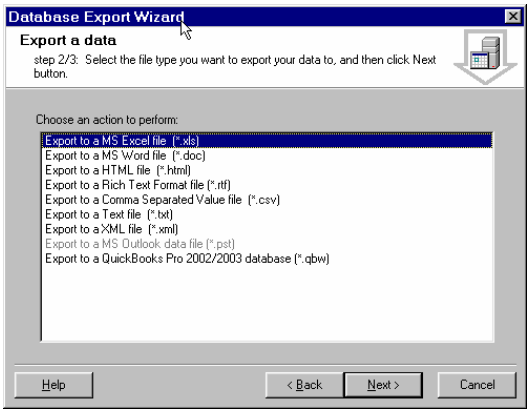
If you have **ScheduleVIEW™ Plus**, you can also export data to your **MSOutlook or QuickBooks™** data files.

You can choose to export Customers, Providers, and Resources.

To begin to Export, access the **Database Export Wizard** by selecting **File** then **Export**.

1. **Choose a Database you wish to export from.**

2. **Select the Type of File you wish to export your Data to.**


Database Export Wizard
Export a data
step 2/3: Select the file type you want to export your data to, and then click Next button.
Choose an action to perform:
Export to a MS Excel file (*.xls)
Export to a MS Word file (*.doc)
Export to a HTML file (*.html)
Export to a Rich Text Format file (*.rtf)
Export to a Comma Separated Value file (*.csv)
Export to a Text file (*.txt)
Export to a XML file (*.xml)
Export to a MS Outlook data file (*.pst)
Export to a QuickBooks Pro 2002/2003 database (*.qbw)
Help
< Back
Next >
Cancel

ScheduleVIEW™ can export data directly in the following formats:

- Excel (.xls)
- Word (.doc)
- HTML (.html)
- Rich Text Format (.rtf),
- Comma Separated Value (.csv),
- Text files (.txt),
- XML files (.xml)

3. **Select the File and Describe the Information You want to Export.**

Please Note, your window may look different depending on the type of file you are importing.

Select the file you are exporting to and whether or not the export file has a "header row".

Select each field you are exporting and match it to a column in your export field.

Select **Finish** to complete the Export Process.

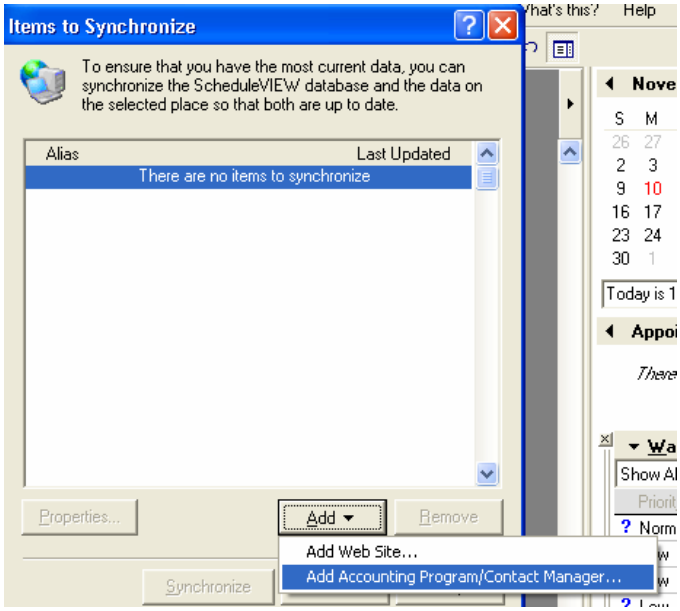
Save this export process as a Template if you wish to use it again.

QUICKBOOKS™: SYNCHING ScheduleVIEW™ DATA WITH QUICKBOOKS™

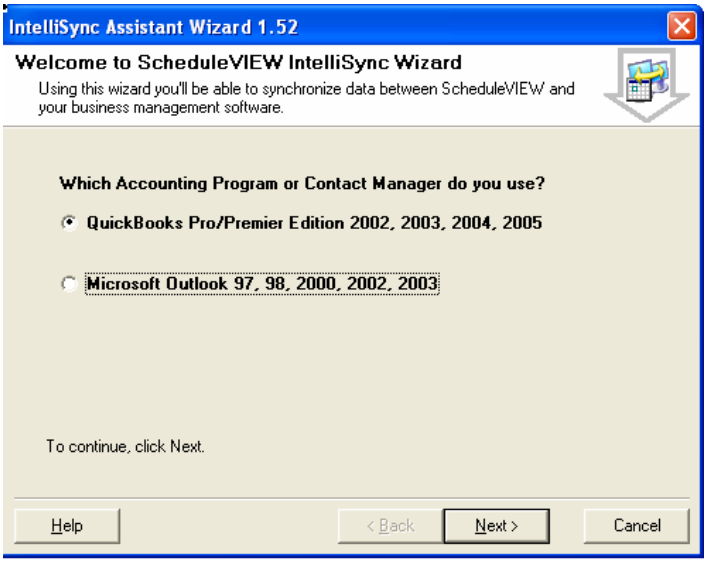
TO SYNC BETWEEN SCHEDULEVIEW™ AND QUICKBOOKS™: YOU MUST HAVE SCHEDULEVIEW™ PLUS AND QUICKBOOKS PRO™, PREMIER™, OR ENTERPRISE™ 2002 OR NEWER.

PLEASE NOTE THAT YOU ARE SYNCHING CUSTOMER DEMOGRAPHICS ONLY; NAME, ADDRESS, PHONE NUMBER ETC.

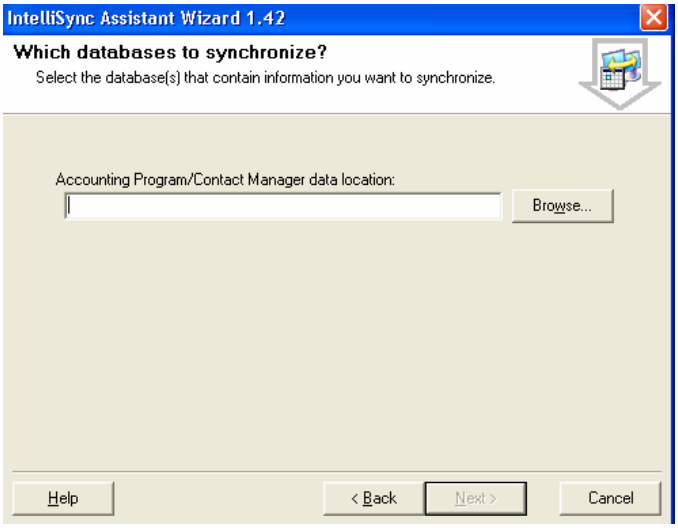
Click on 'File' 'Synchronize'


Items to Synchronize
To ensure that you have the most current data, you can synchronize the ScheduleVIEW database and the data on the selected place so that both are up to date.
Alias
Last Updated
There are no items to synchronize
Properties...
Add
Remove
Synchronize
Add Web Site...
Add Accounting Program/Contact Manager...
What's this?
Help

Click on 'Add' and
Click on 'Add Accounting Program/Contact Manager'

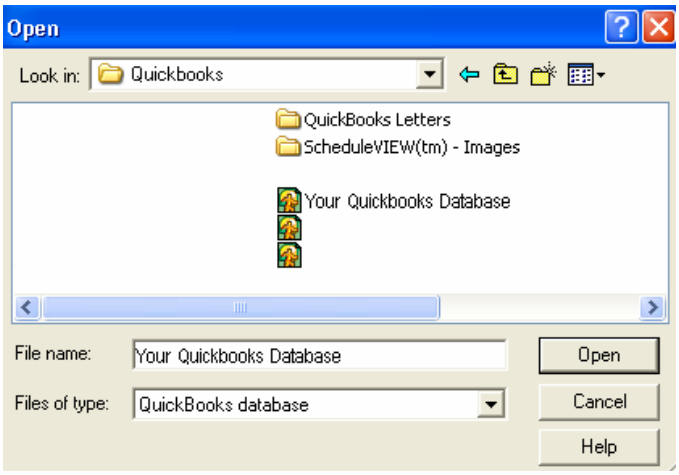

IntelliSync Assistant Wizard 1.52
Welcome to ScheduleVIEW IntelliSync Wizard
Using this wizard you'll be able to synchronize data between ScheduleVIEW and your business management software.
Which Accounting Program or Contact Manager do you use?
QuickBooks Pro/Premier Edition 2002, 2003, 2004, 2005
Microsoft Outlook 97, 98, 2000, 2002, 2003
To continue, click Next.
Help
< Back
Next >
Cancel

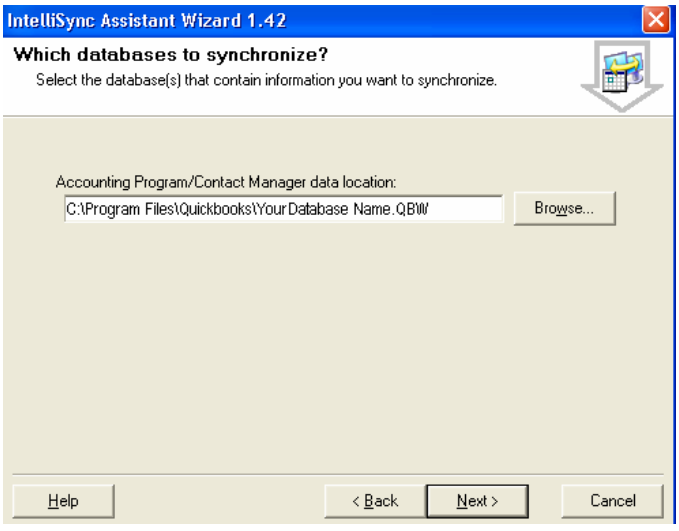
Click on 'QuickBooks Pro……' and
Click 'Next'



Click on 'Browse' and browse to your Quickbooks™ database

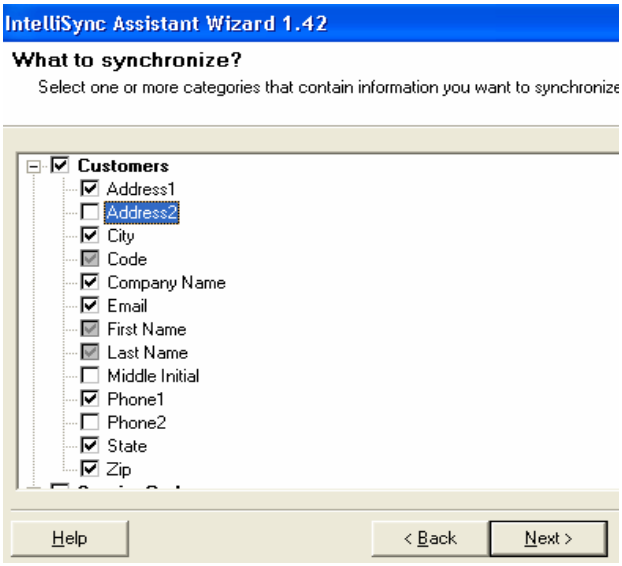
Click on your database and Click 'Open'





This will take you back to your Assistant Wizard screen and your drive path will be filled in.

Click on 'Next'



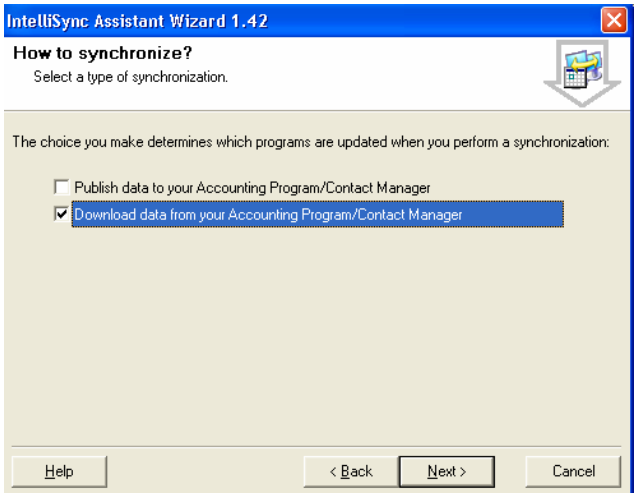
Put a checkmark next to 'Customers' and Check each field you want to sync

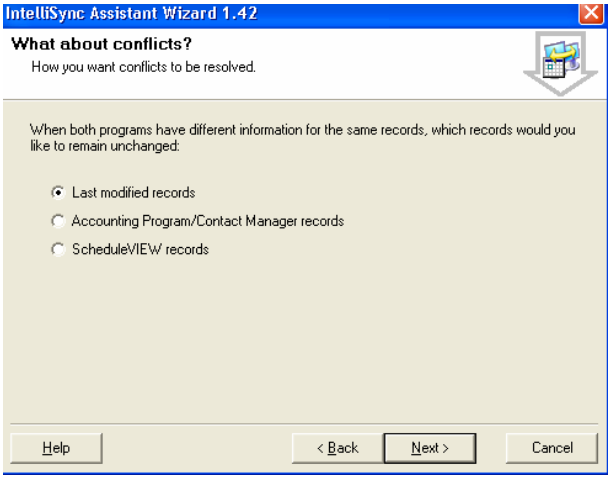
Click 'Next'

'Publish data to your Accounting Program/Contact Manager' will take data **from ScheduleVIEW™ PLUS** to QuickBooks™ Pro or Premier.

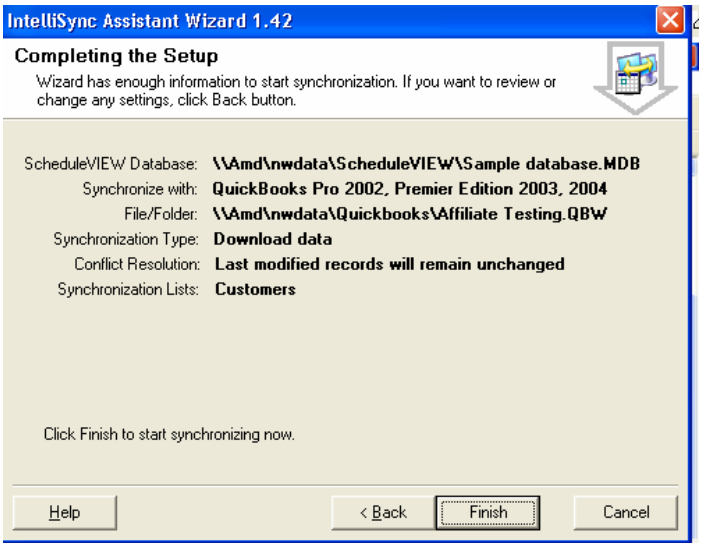
'Publish data from your Accounting Program/Contact Manager' will take data **from QuickBooks™ Pro or Premier** to ScheduleVIEW™ PLUS.

Check which you would like to do andClick 'Next'


IntelliSync Assistant Wizard 1.42
How to synchronize?
Select a type of synchronization.
The choice you make determines which programs are updated when you perform a synchronization:
Publish data to your Accounting Program/Contact Manager
Download data from your Accounting Program/Contact Manager
Help
< Back
Next >
Cancel


IntelliSync Assistant Wizard 1.42
What about conflicts?
How you want conflicts to be resolved.
When both programs have different information for the same records, which records would you like to remain unchanged:
Last modified records
Accounting Program/Contact Manager records
ScheduleVIEW records
Help
< Back
Next >
Cancel

Choose how you want to handle your data. Click 'Next'

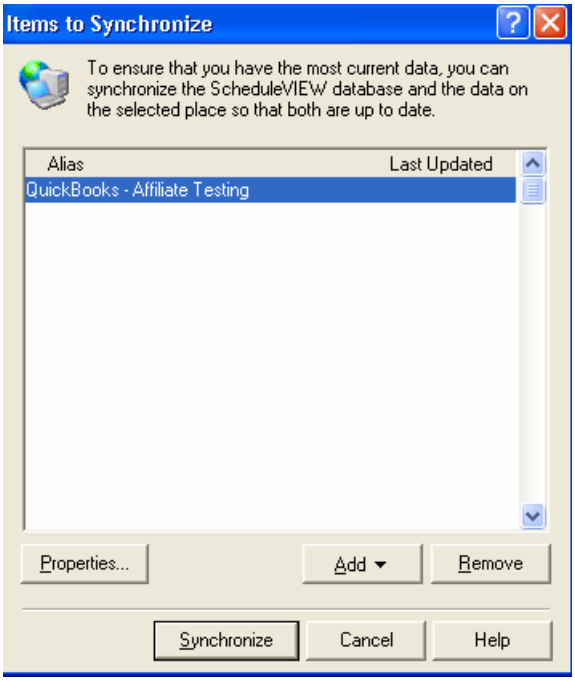

IntelliSync Assistant Wizard 1.42
Completing the Setup
Wizard has enough information to start synchronization. If you want to review or change any settings, click Back button.
ScheduleVIEW Database: \\Amd\nwdata\ScheduleVIEW\Sample database.MDB
Synchronize with: QuickBooks Pro 2002, Premier Edition 2003, 2004
File/Folder: \\Amd\nwdata\Quickbooks\Affiliate Testing.QBW
Synchronization Type: Download data
Conflict Resolution: Last modified records will remain unchanged
Synchronization Lists: Customers
Click Finish to start synchronizing now.
Help
< Back
Finish
Cancel

Review your choices and make any changes you need.
Click 'Finish'.

IMPORTANT-- You must have Quickbooks open in the background for the wizard to complete.

You MAY get a warning that ScheduleVIEW(tm) has not been authorized to access QuickBooks(tm). If you get this message, be sure to use the option on that screen to allow ScheduleVIEW(tm) to access your QuickBooks(tm) database.

From now on when you begin your sync, you may just choose 'Synchronize' and **ScheduleVIEW™** PLUS will remember your settings.

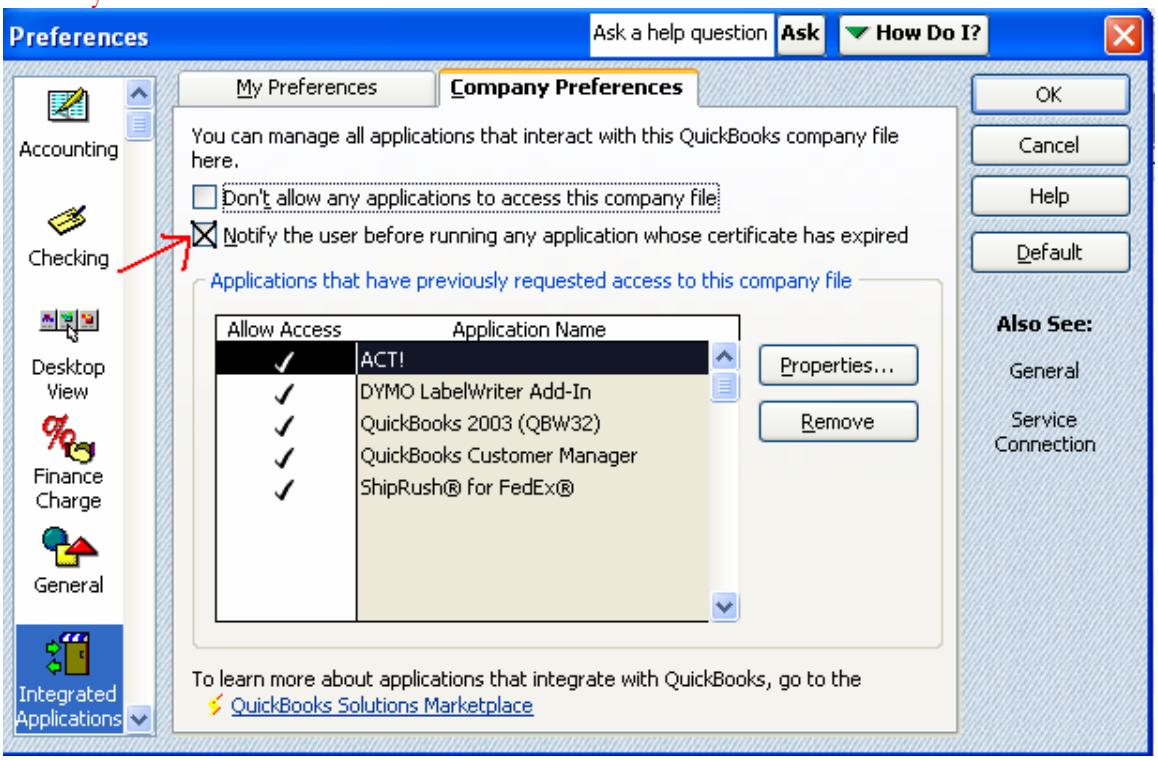

Items to Synchronize
To ensure that you have the most current data, you can synchronize the ScheduleVIEW database and the data on the selected place so that both are up to date.
Alias
Last Updated
QuickBooks - Affiliate Testing
Properties...
Add
Remove
Synchronize
Cancel
Help

To make changes you will click on 'Properties'

****Please note that ScheduleVIEW™ does not synch 'Sub-jobs' with QuickBooks™ Contractor ****

Troubleshooting QuickBooks™ synch:

**To set up QuickBooks™: Before synching open QuickBooks™ and click on 'Edit' 'Preferences' 'Integrated Applications' 'Company Preferences' Make sure you have 'Don't allow…'unchecked and
'Notify the user….' checked.



**IMPORTANT - You must have QuickBooks™ open in the background for the wizard to complete.

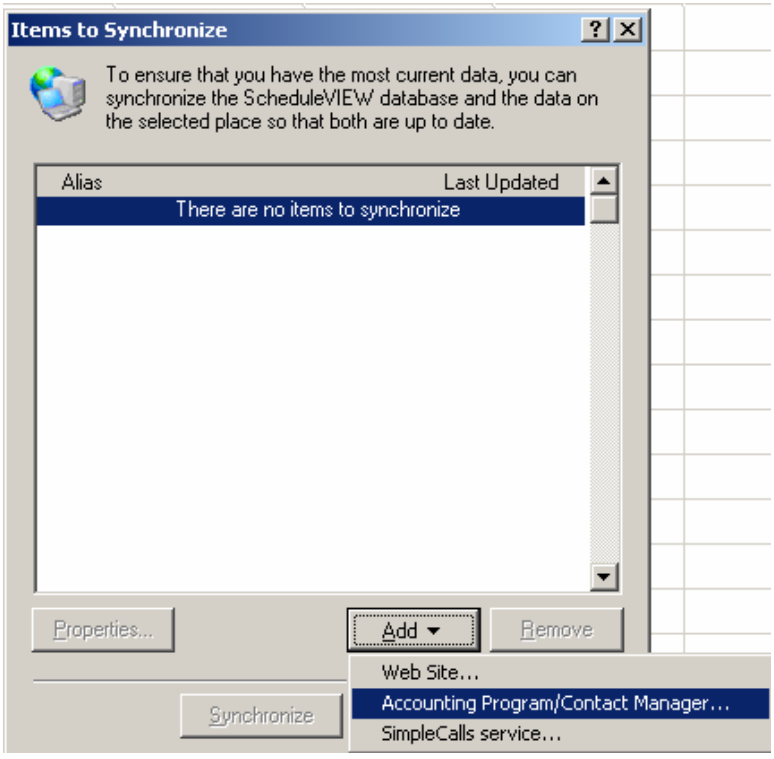
**You MAY get a warning that ScheduleVIEW™ has not been authorized to access QuickBooks™. If you get this message, be sure to use the option on that screen to allow ScheduleVIEW™ to access your QuickBooks™ database.

Now you can access a QuickBooks™ invoice when editing an Appointment: Have QuickBooks™ open. In the Edit Appointment screen click on the 'Add Invoice' button to automatically open up the invoicing process in QuickBooks and transfer the data from ScheduleVIEW™ to QuickBooks. It's that simple!

OUTLOOK™: SYNCHING ScheduleVIEW™ DATA WITH MSOUTLOOK™

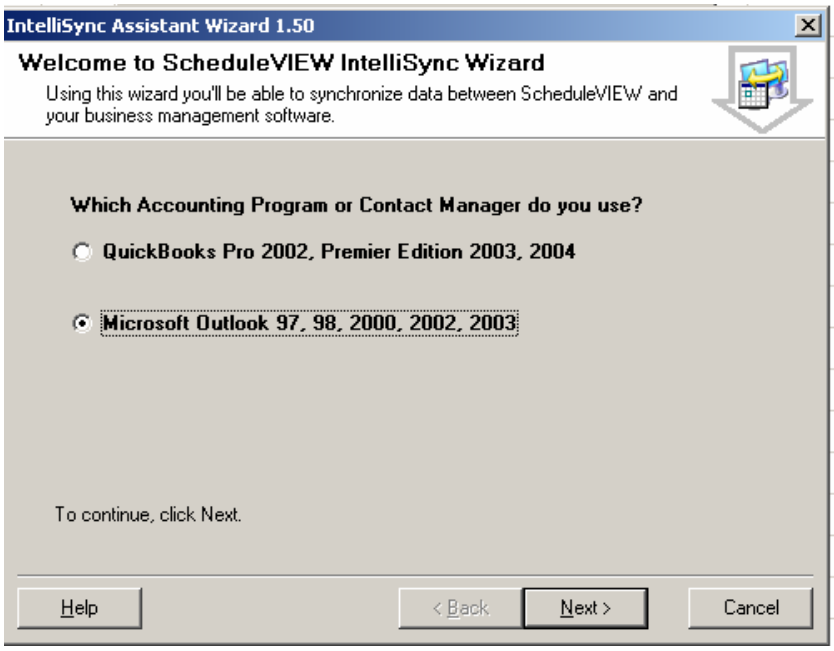
TO SYNC BETWEEN SCHEDULEVIEW™ AND MS OUTLOOK™: YOU MUST HAVE SCHEDULEVIEW™ PLUS **AND** MS OUTLOOK™ 1997 OR NEWER. (SCHEDULEVIEW™ PLUS DOES NOT SYNC WITH OUTLOOK EXPRESS™)

Click on 'File' 'Synchronize'


Items to Synchronize
To ensure that you have the most current data, you can synchronize the ScheduleVIEW database and the data on the selected place so that both are up to date.
Alias
Last Updated
There are no items to synchronize
Properties...
Add
Remove
Synchronize
Web Site...
Accounting Program/Contact Manager...
SimpleCalls service...

Click on 'Add' and

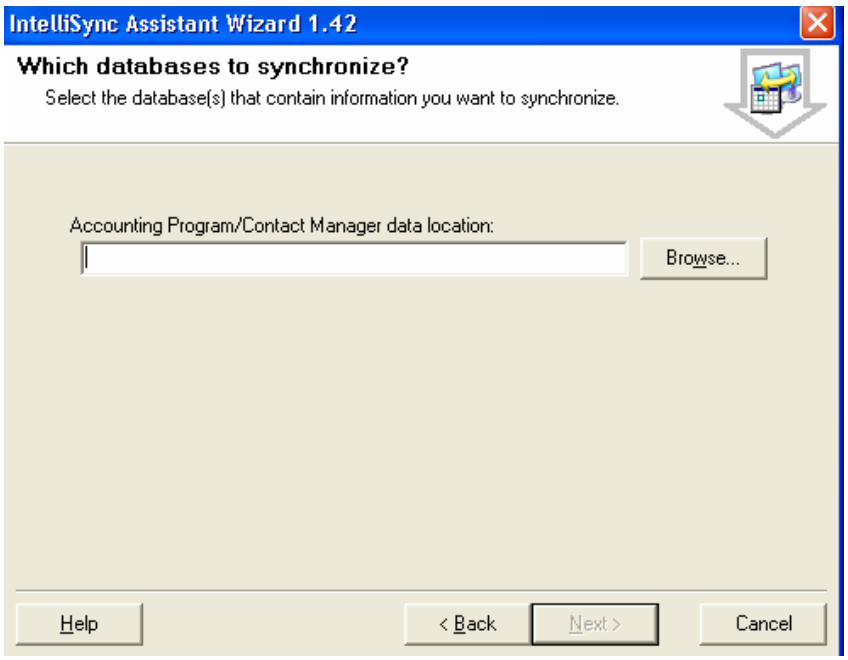
Click on 'Add Accounting Program/Contact Manager'


IntelliSync Assistant Wizard 1.50
Welcome to ScheduleVIEW IntelliSync Wizard
Using this wizard you'll be able to synchronize data between ScheduleVIEW and your business management software.
Which Accounting Program or Contact Manager do you use?
QuickBooks Pro 2002, Premier Edition 2003, 2004
Microsoft Outlook 97, 98, 2000, 2002, 2003
To continue, click Next.
Help
< Back
Next >
Cancel

Click on 'Microsoft Outlook……' and

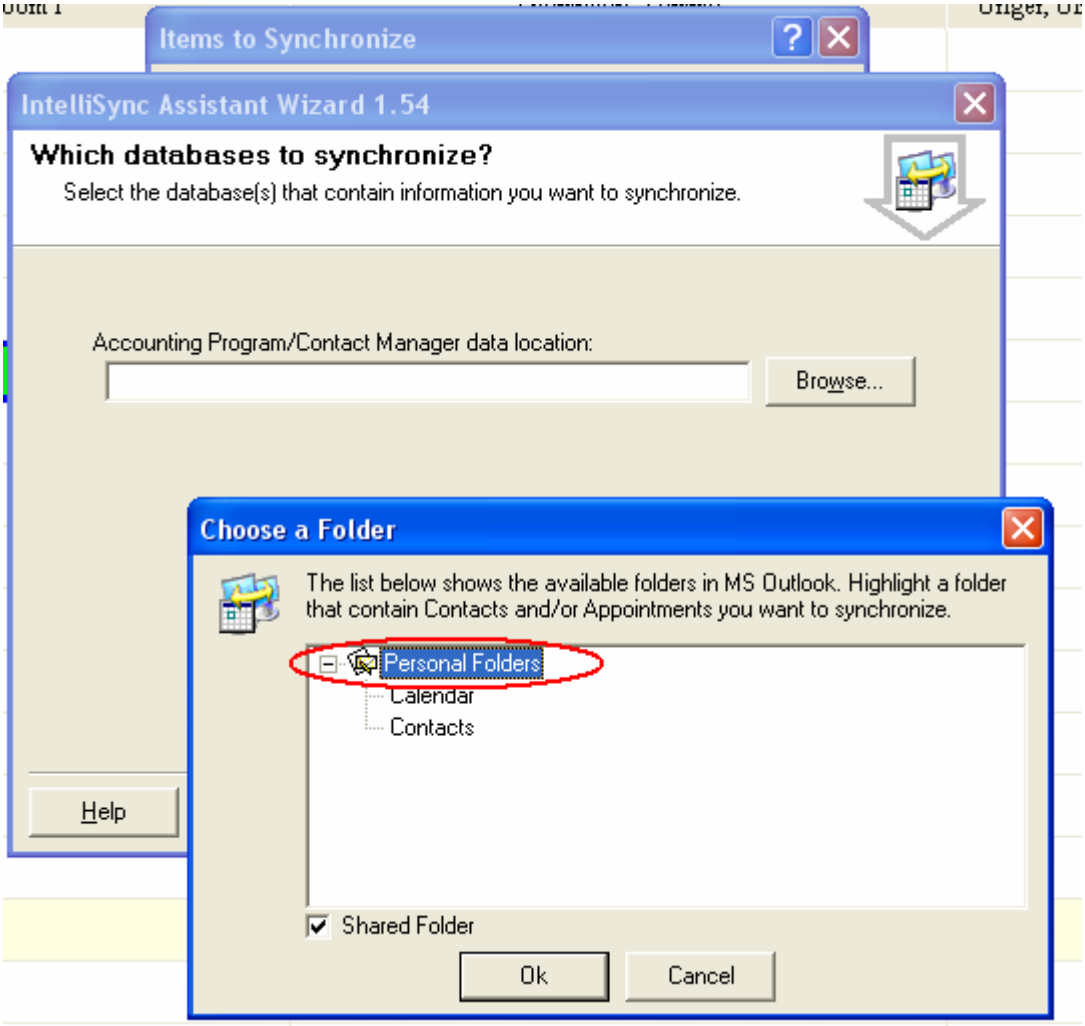
Click 'Next'

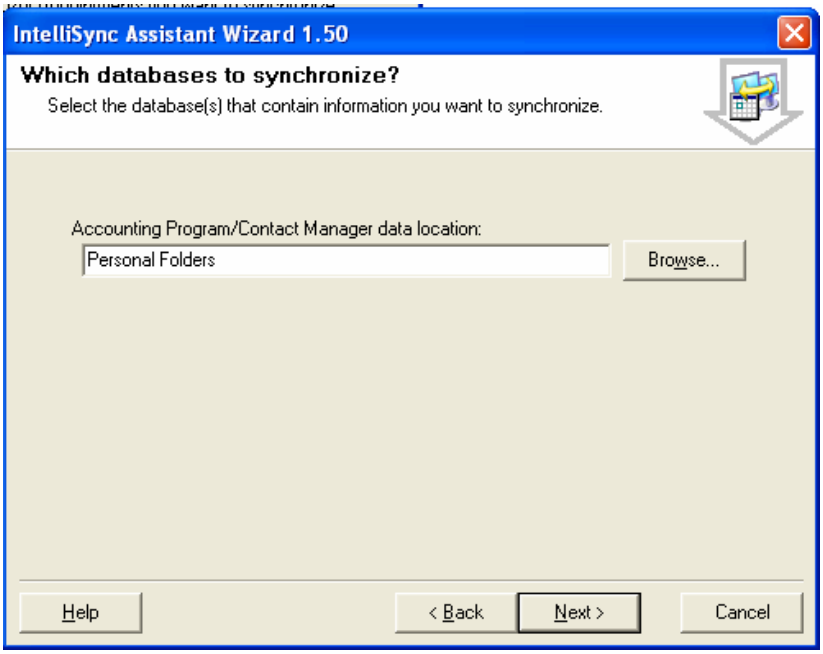
Click on 'Browse' and browse your MS Outlook™ database



to

Click on your database and Click 'OK'


Items to Synchronize
IntelliSync Assistant Wizard 1.54
Which databases to synchronize?
Select the database(s) that contain information you want to synchronize.
Accounting Program/Contact Manager data location:
Browse...
Choose a Folder
The list below shows the available folders in MS Outlook. Highlight a folder that contain Contacts and/or Appointments you want to synchronize.
Personal Folders
Calendar
Contacts
Help
Shared Folder
Ok
Cancel



This will take you back to your Assistant Wizard screen and your Folder will be filled in.

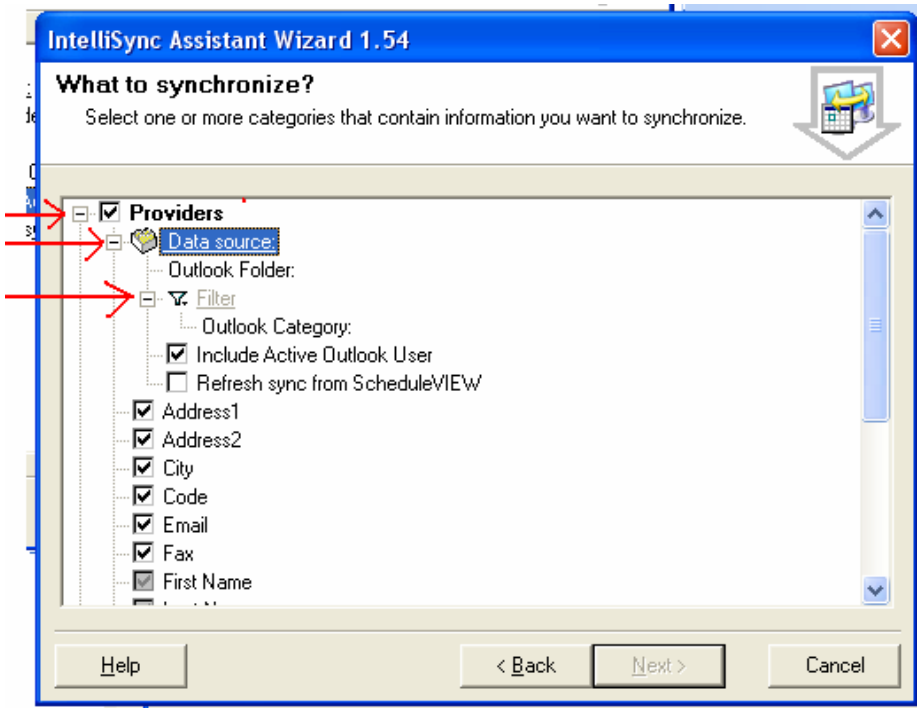
Click on 'Next'

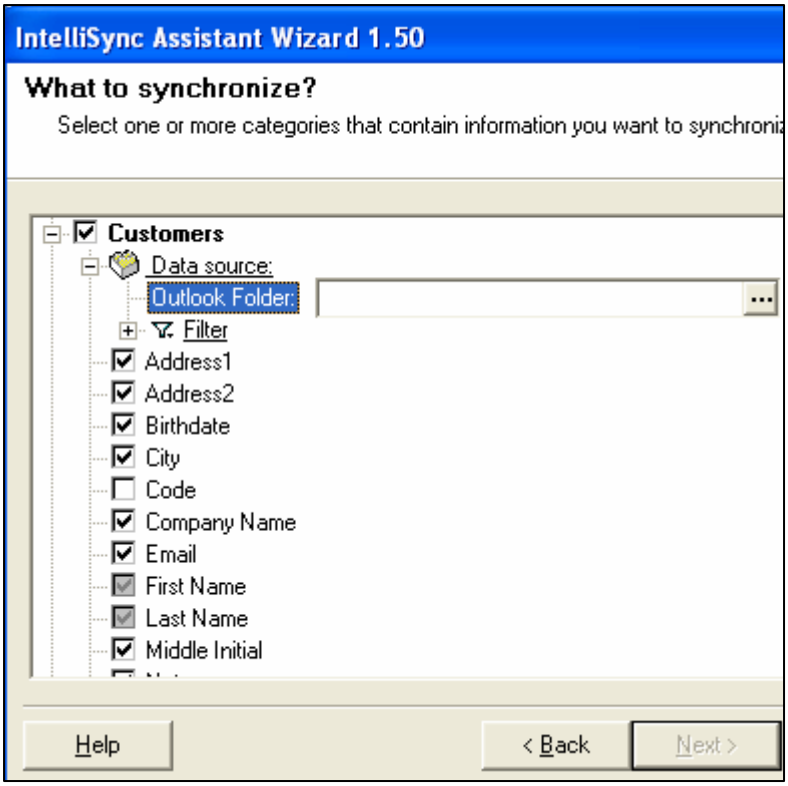
A. Put a checkmark next to 'Providers'

B. Click the + next to 'Data Source' to open the drop-down menu

C. Click the + next to 'Filter' to open the drop-down menu

D. Put a checkmark next to 'Include Active Outlook User'





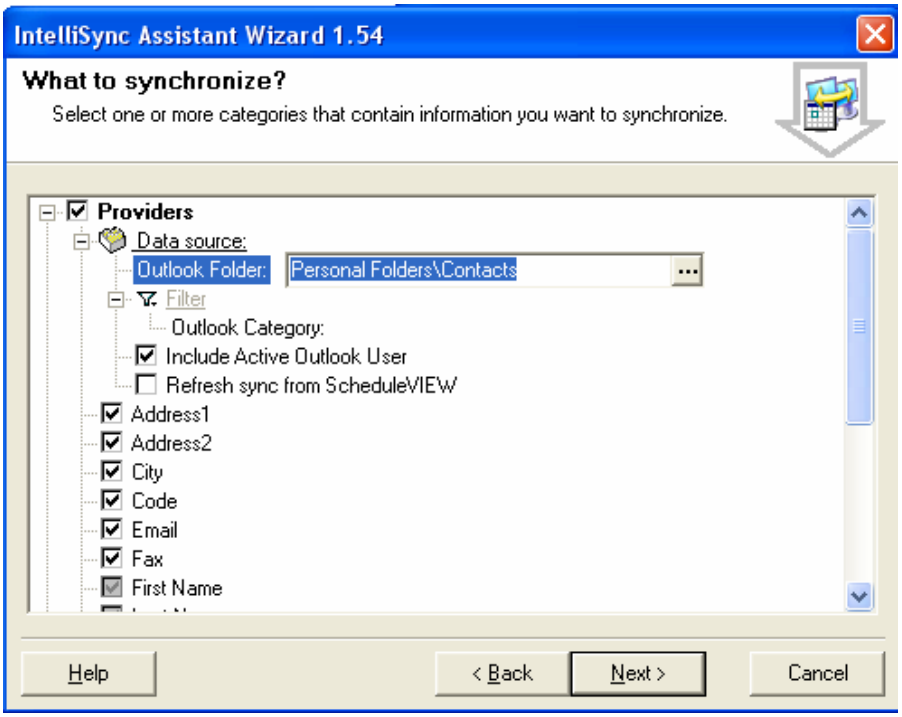
Click on 'Outlook Folder'

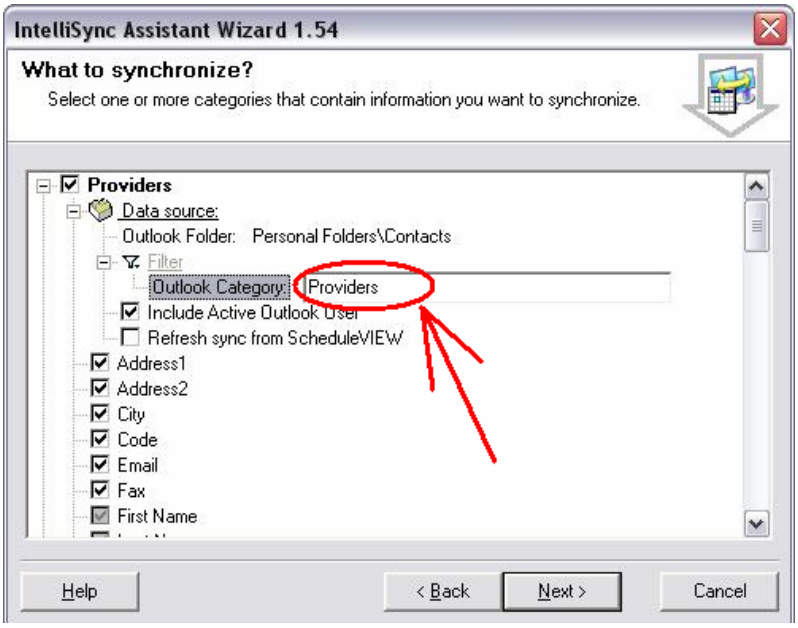
Click on the ... to browse to your Outlook Folder

Choose a Folder
The list below shows the available folders in MS Outlook. Highlight a folder that contain Contacts and/or Appointments you want to synchronize.
Personal Folders
Contacts
Ok
Cancel

Choose your folder and click 'OK'

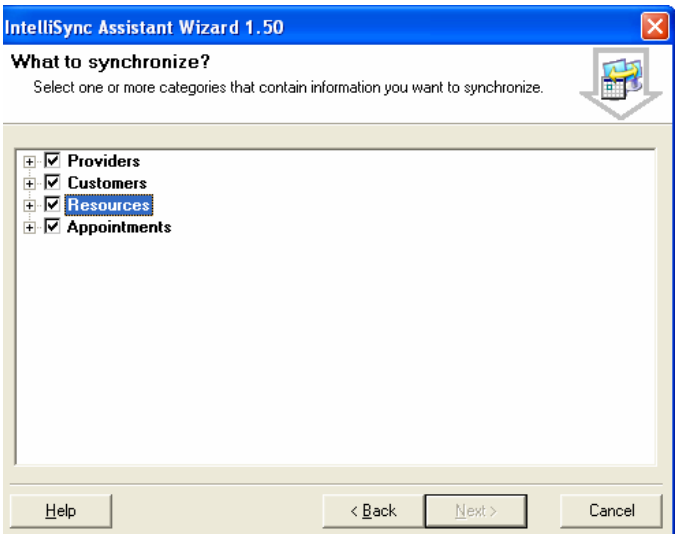
Now scroll down and check each field you want to sync; i.e. 'Address 1' 'City' 'Email' 'Company Name' etc.





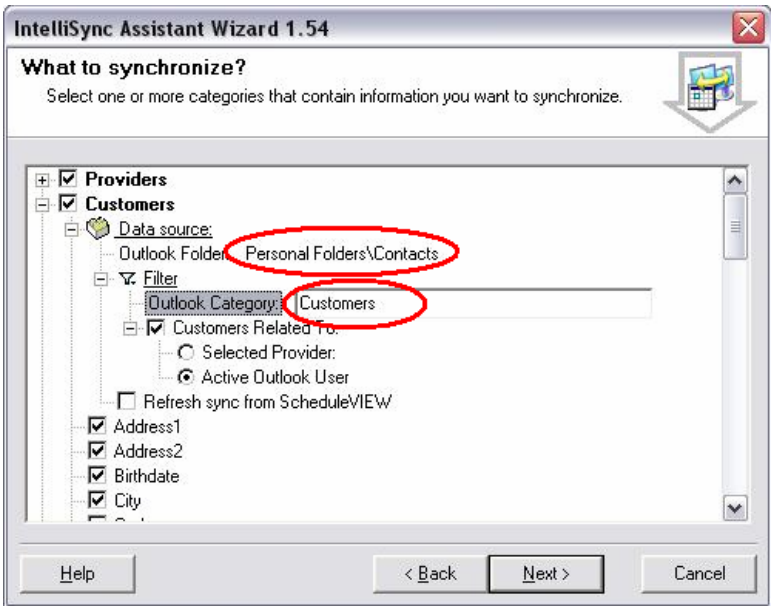
****You must choose an Outlook Category****

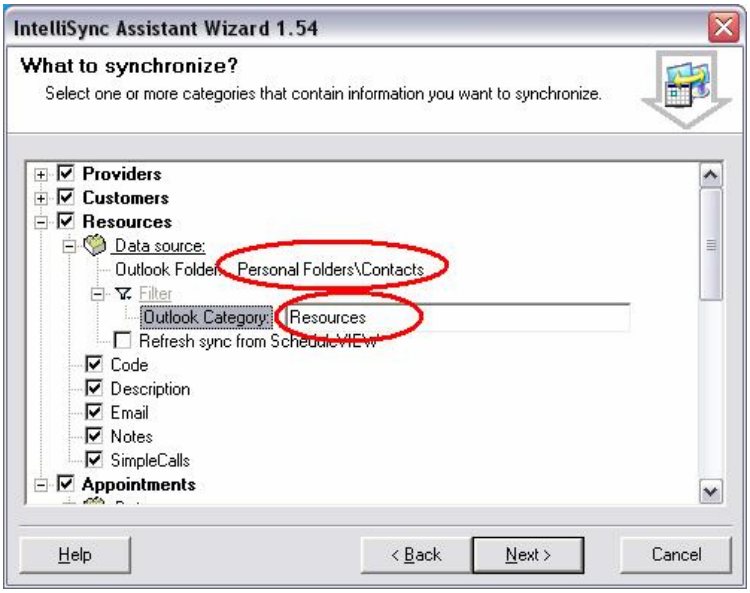
For this example you are synching Providers so click on 'Outlook Category' and type in the word 'Providers'.



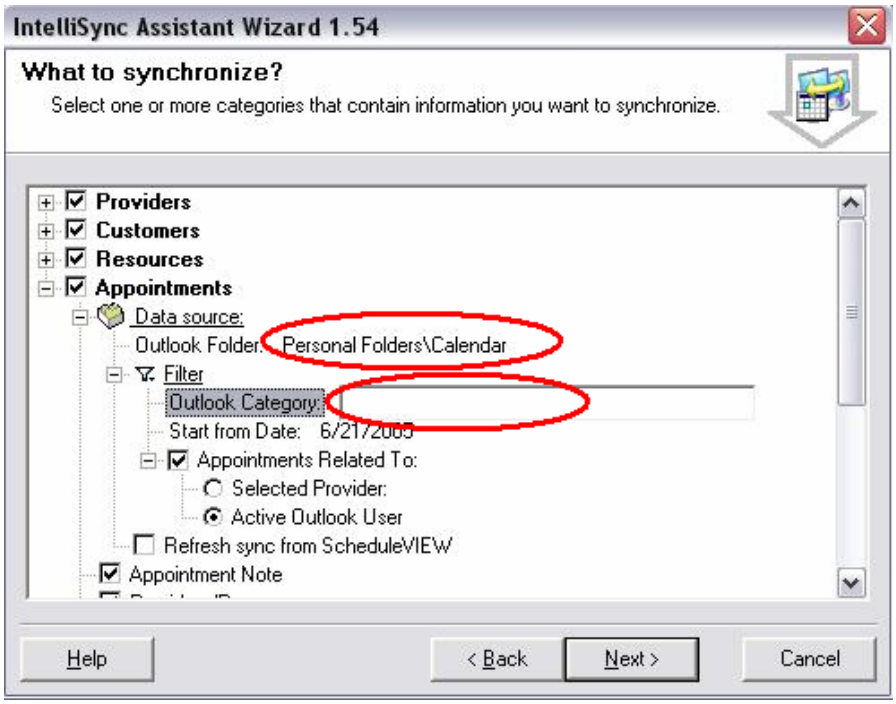
IMPORTANT: This process will be repeated for each category: Providers, Customers, Resources, and Appointments:

Example for 'Customers'



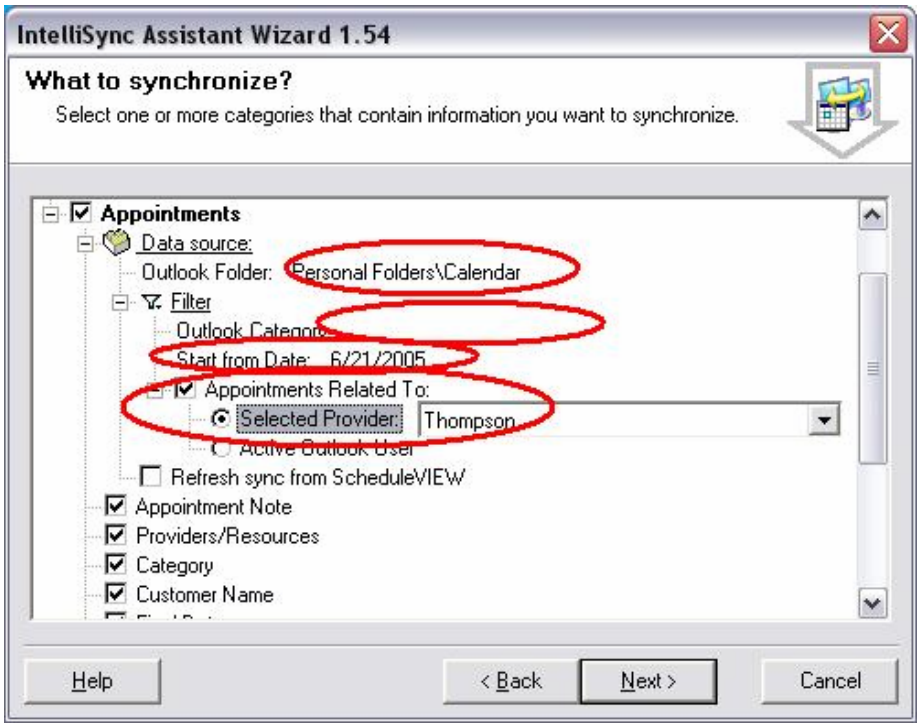


Example for 'Resources'

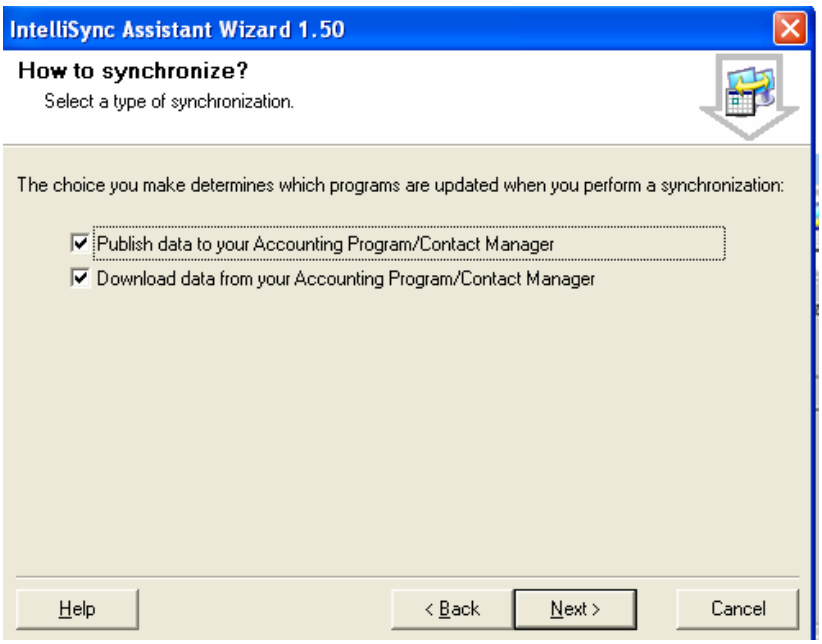


You don't need to set category for Appointments! But you should set a different Outlook folder for them.

If you want, you can set "Start from Date" and "Appointments related to" parameters…



Once you have completed your choices, click 'Next'.

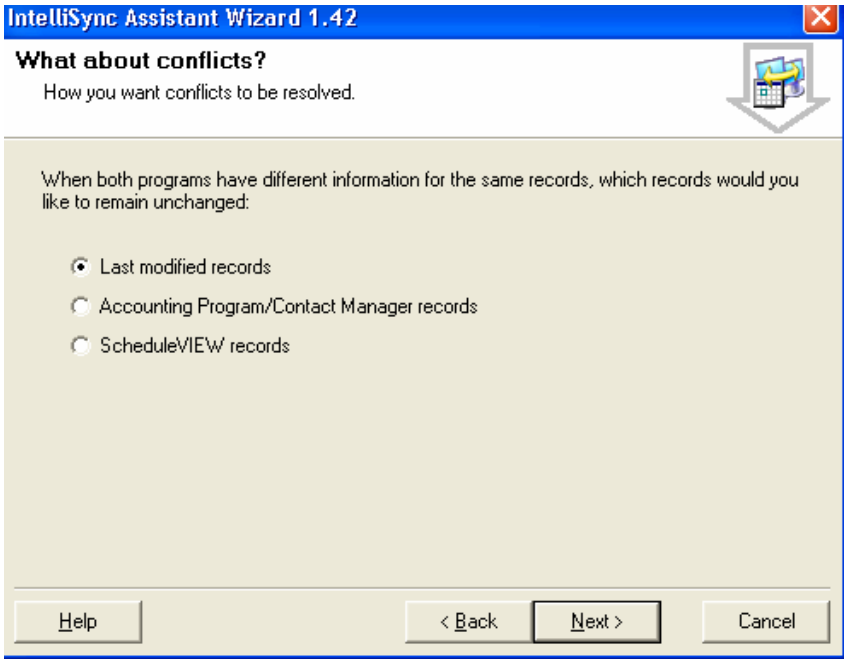

IntelliSync Assistant Wizard 1.50
How to synchronize?
Select a type of synchronization.
The choice you make determines which programs are updated when you perform a synchronization:
Publish data to your Accounting Program/Contact Manager
Download data from your Accounting Program/Contact Manager
Help
< Back
Next >
Cancel

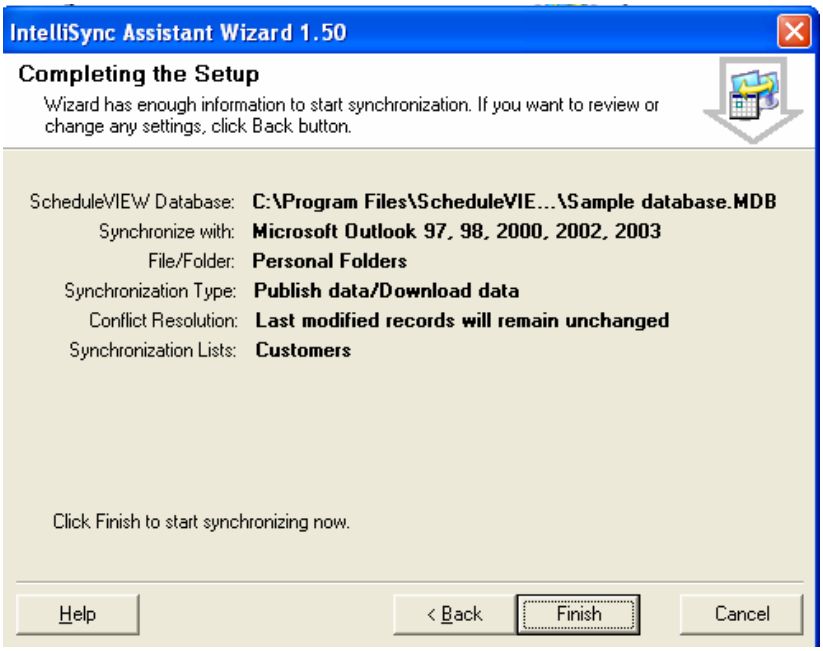
'Publish data <u>from</u> your Accounting Program/Contact Manager' will take data **From MS OUTLOOK** to ScheduleVIEW™ PLUS.

Download data from your Accounting Program/Contact Manager will take data **From ScheduleVIEW™ PLUS** to MS Outlook.

Choose how you want to handle your data.

Click 'Next'

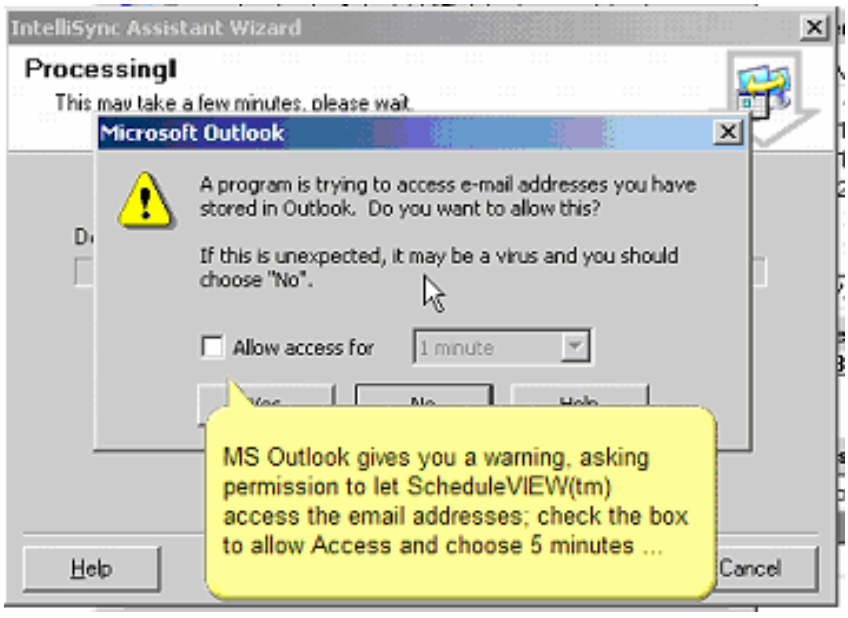

IntelliSync Assistant Wizard 1.42
What about conflicts?
How you want conflicts to be resolved.
When both programs have different information for the same records, which records would you like to remain unchanged:
Last modified records
Accounting Program/Contact Manager records
ScheduleVIEW records
Help
< Back
Next >
Cancel


IntelliSync Assistant Wizard 1.50
Completing the Setup
Wizard has enough information to start synchronization. If you want to review or change any settings, click Back button.
ScheduleVIEW Database: C:\Program Files\ScheduleVIE...\Sample database.MDB
Synchronize with: Microsoft Outlook 97, 98, 2000, 2002, 2003
File/Folder: Personal Folders
Synchronization Type: Publish data/Download data
Conflict Resolution: Last modified records will remain unchanged
Synchronization Lists: Customers
Click Finish to start synchronizing now.
Help
< Back
Finish
Cancel

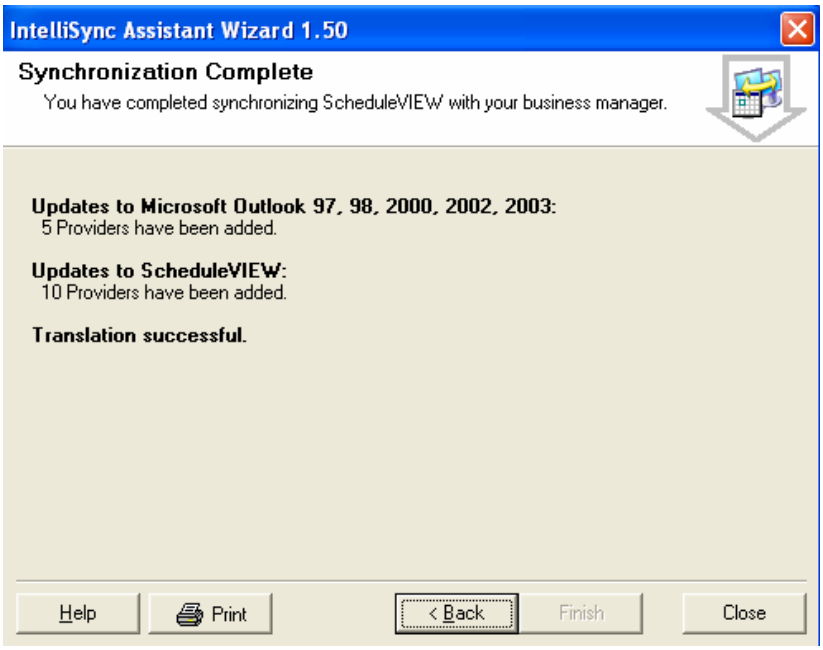
Review your choices.
(If you need to make changes, click 'Back')

Click 'Finish'

Put a checkmark in 'Allow access for'

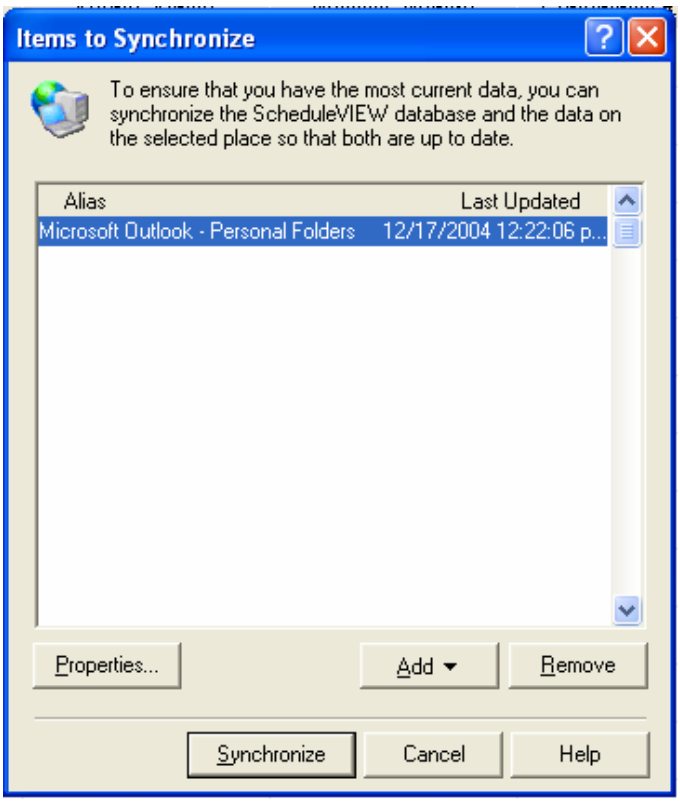

IntelliSync Assistant Wizard
Processing!
This may take a few minutes, please wait.
Microsoft Outlook
A program is trying to access e-mail addresses you have stored in Outlook. Do you want to allow this?
If this is unexpected, it may be a virus and you should choose "No".
Allow access for
1 minute
MS Outlook gives you a warning, asking permission to let ScheduleVIEW(tm) access the email addresses; check the box to allow Access and choose 5 minutes ...
Help
Cancel

Click the drop-down arrow to
Choose 5 minutes
Click on 'Yes'



From now on when you begin your sync, you may just choose 'Synchronize' and ScheduleVIEW™ PLUS will remember your settings.

Now you see that MS Outlook™ has been added to the synchronization list.


Items to Synchronize
To ensure that you have the most current data, you can synchronize the ScheduleVIEW database and the data on the selected place so that both are up to date.
Alias
Last Updated
Microsoft Outlook - Personal Folders
12/17/2004 12:22:06 p...
Properties...
Add
Remove
Synchronize
Cancel
Help

To make any changes to an existing account click on 'Properties' and you can go through the process again, making modifications.

USING THE SYNC FROM ScheduleVIEW™ TO MS OUTLOOK YOU ARE ABLE TO LINK TO YOUR WINDOWS-BASED POCKET PC

Using Reports

USING REPORTS

USING ScheduleVIEW™ REPORTS

ScheduleVIEW™ has a robust reporting system that allows you to query the database using focused selection criteria. The report formats offer summaries and detail versions and also provide for email, reminders, letters, and mailing label creations.

To access **ScheduleVIEW™**'s **Report Menu**, select **Reports** from the **Main Menu**.

Report Selection Window

When selected, most reports in **ScheduleVIEW™** will pop open a **Report Selection Window** that allows you to define variables and selection criteria. While each report has its own selection criteria and values, there are common options for many of the reports. Please note: when you leave a white box BLANK, that means you want all records, in other words, you are telling the program "DO NOT use any selection criteria for this field".

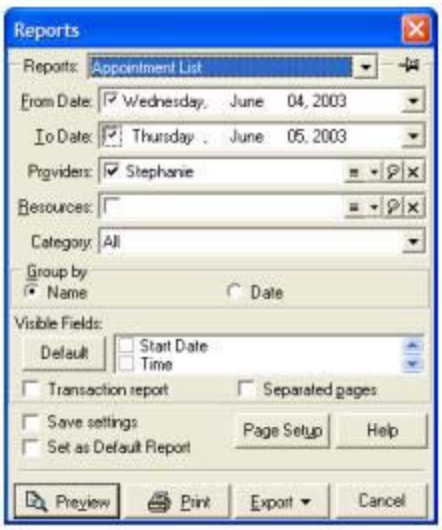
Troubleshooting hint: When you experience a message that says there is NO DATA for the criteria specified, please go back and try running the report with as many white boxes left BLANK, but checked.

Here is an example using the **Report List Function.**

The first sections of the window list selection criteria for the report, such as from and to date, providers, resources, categories as well as sorting and group options and other display options for the report.

The last section always offers the following options:

- Page Setup – allows you to define printer setup, margin widths and page layout.
- Save Settings – saves the page setup settings for this report
- Set as Default Report – saves this report as a default report on the Default Report List.



The bottom toolbar offers options to **Preview** the report, **Print** and send it directly to the printer, export it in various formats or to cancel and close the window.

PRINT PREVIEW TOOLBAR

ScheduleVIEW™ gives you the option of previewing your reports before printing them, ensuring that you are getting the information you need quickly and without excessive paper. Each report has an optional preview function that opens a Print Preview Window, which contains the report, and the following Print Preview Toolbar.

The Print Preview Toolbar is divided into 5 sections:

1. Viewing the Preview

- Zoom to Fit – lets you see the entire page of the report in the window.
- 100% - lets you see the report at 100%.
- Zoom to Width – lets you Zoom the report to fit the width of the window.

2. Navigating through the Preview – allows you to page back and forth through a multi-page report preview.

- First Page
- Previous Page
- Next Page
- Last Page

3. Printing Functions

- Printer Setup – brings up the Printer Setup Window and allows you to change printer defaults.
- Print Report – sends the preview to the printer.

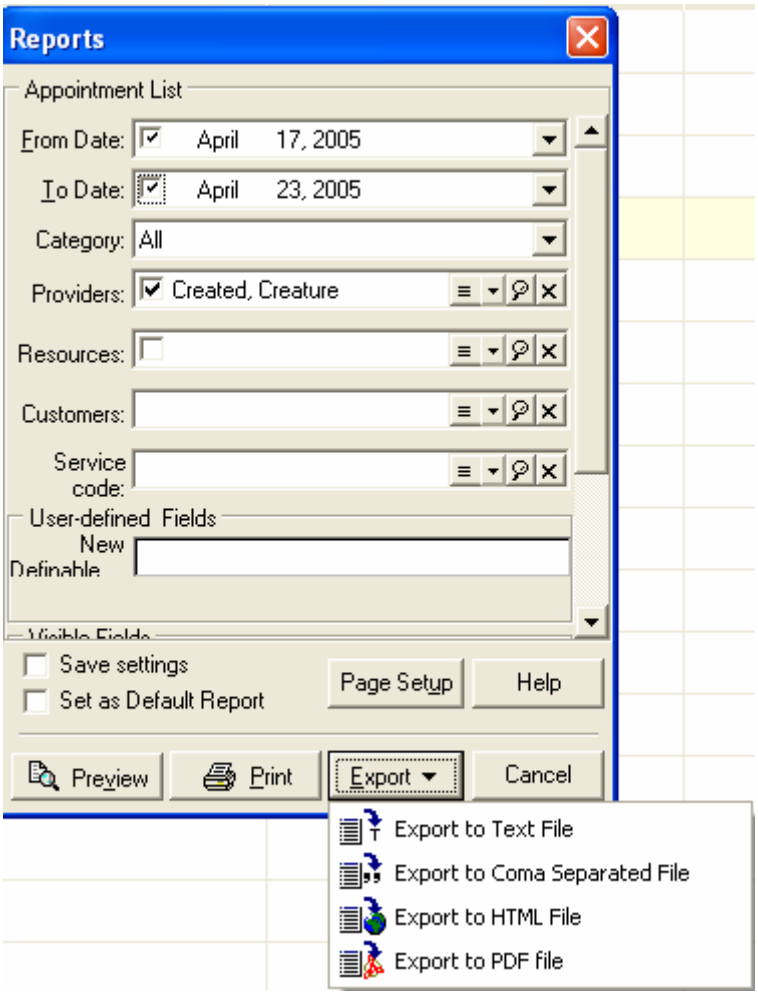
4. Save and Load Preview

- Save Report – saves the preview on your computer or network as a Quick Report File (.qrp)
- Load Report – opens previously saved Quick Report Files (.qrp) that can then be previewed and printed.

5. Close Preview Window – exits the preview window.

EXPORTING A REPORT

ScheduleVIEW™ allows you to export any of its reports into four formats: text file (.txt) which can be imported into any word processing system; comma separated files (.csv), which can easily be imported into spreadsheet applications such as Excel, HTML format (.html) for publication on websites, or Adobe Portable Document Reader files (.pdf) for viewing and printing with the free Adobe Reader.



To Export a report, select Export, then one of the formats.

A "Save As Window" appears. Give the file a name and select the directory in which the exported file will be stored.

Please note: When Exporting a report, the report may not look exactly the way it does in the original or the way that you expect. This is due to formatting constraints\restrictions placed by third party exporting tools that we use in developing **ScheduleVIEW™.** We regret any inconvenience this may place on you.

SHOW REPORT LIST

Many of **ScheduleVIEW™**'s reports can be accessed through the **Show Report List** Window, which is accessed either through the **Report Menu** or by pressing **Cntrl-R** on your keyboard.

As you select an individual report, the selection criteria for that report will be displayed in the Window.

ADVANCED REPORTS

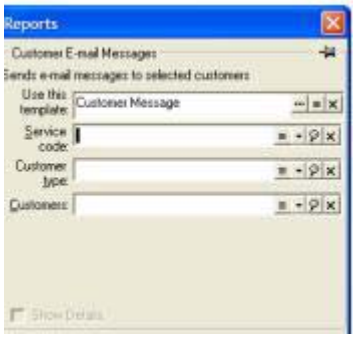
NOTE - Advanced Reports are available only in ScheduleVIEW™ PLUS.
Click on 'Reports' and 'Advanced Reports':

➢ CUSTOMER E-MAIL MESSAGES

Description

The Customer E-Mail Messages allows you to send email messages to selected customers. The messages can use a pre-established template.

Selection Criteria



Select or Edit a Template to use with this message.

Select customers with specific Service Codes to send this message to.

Select customers with specific Customer Types to send this message to.

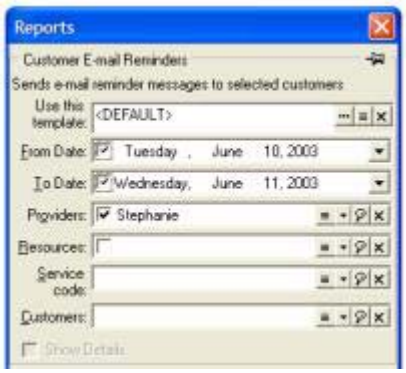
Select specific Customers to send this message to.

➢ CUSTOMER E-MAIL REMINDERS

Description

The Customer E-Mail Reminders allows you to send email appointment reminders to selected customers.

Selection Criteria



Select or Edit a Template to use with this message. (See 'Sending Appointment Reminders' in this manual)

Select customers with appointments within a From and/or To Date range.

Select customers with appointments with specific Providers.

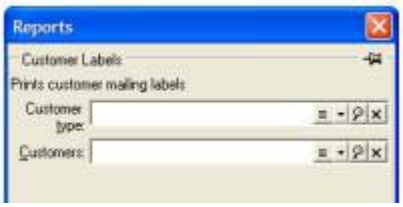
Select customers with appointments for specific Service Codes

Select customers with specific Customer Types.
Select specific Customers.

➢ CUSTOMER LABELS

Description

This prints mailing labels for customers.



Selection Criteria

Select customers with specific Customer Types.

Select specific Customers.

➢ CUSTOMER LETTERS

Description

This prints letters for customers.

Selection Criteria

Select or Edit a Template to use with this message.

Select customers with specific Customer Types.

Select specific Customers.

➢ CUSTOMER STATISTICAL REPORT

Description

This report shows how many new customers were seen during this time period.

Selection Criteria

From and To Dates to include in the Report.

Please note: Selecting **Show Details** will print out details of all the new customers within this timeframe.

➢ PROVIDER ANALYSIS

Description

This report shows how the number of appointments each provider had during a time period.

Selection Criteria

From and To Dates to include in the Report.

Types of Providers to include in the Report.

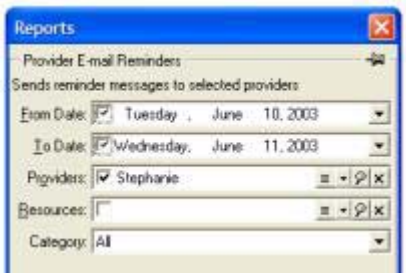
Specific Providers to include in the Report.

Please note: Selecting **Show Details** will print out details of all the new customers within this timeframe.

➢ PROVIDER EMAIL REMINDERS

Description

This sends email reminders to Providers. (See 'Sending Appointment Reminders' in this manual)



Selection Criteria

Select Providers with appointments within a From and/or To Date range.

Select specific Providers.

Select Providers using specific Resources

Select Providers in specific Categories.

➢ RESOURCE EMAIL REMINDERS

Description

This sends email reminders to Resources.

Selection Criteria

Select Resources with appointments within a From and/or To Date range. (See 'Sending Appointment Reminders' in this manual)

Select specific Providers.

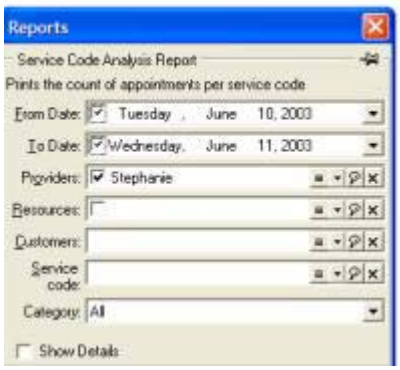
Select specific Resources

Select Resources in specific Categories.

➢ SERVICE CODE ANALYSIS REPORT

Description

This report shows how the number of appointments for each service code.



Selection Criteria

Select appointments within a From and/or To Date range.

Select appointments with specific Providers.

Select appointments with specific Resources.

Select appointments with specific Customers.

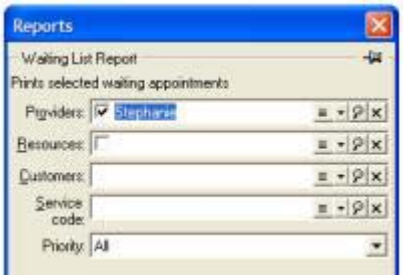
Select appointments with specific Service Codes

Select appointments with specific Categories

Please note: Selecting **Show Details** will print out details of all the appointments that meet these specified criteria.

➢ WAITING LIST REPORT

Description



This report shows the current Waiting List.

Selection Criteria

Select Waiting List with specific Providers

Select Waiting List with specific Resources

Select Waiting List with specific Customers

Select Waiting List with specific Service Codes

Select Waiting List with specific Priorities.

APPOINTMENT REPORTS

➢ TODAY'S APPOINTMENT

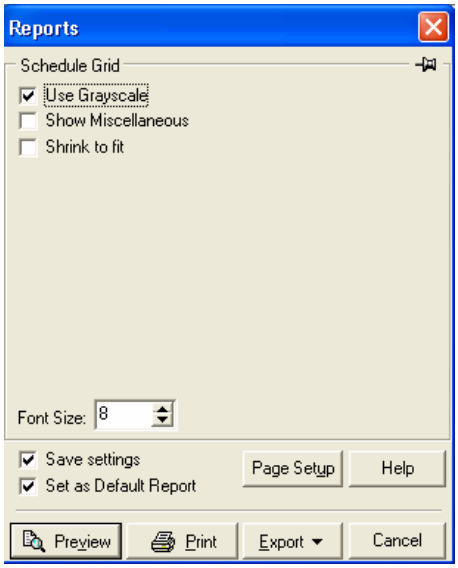
Description

This report prints out Today's Appointments.

SCHEDULE GRID REPORT

This report shows today's appointment schedule in Grid Format.

Click on 'Reports' and 'Schedule Grid' on your Calendar page.



This is your view for ScheduleVIEW™ Lite or Standard.

Select 'Use Grayscale' if you want to print grid in black and white.

Select 'Show Miscellaneous' to print breaks, etc on the Grid.

Check 'Save Settings' and your choices will be saved.

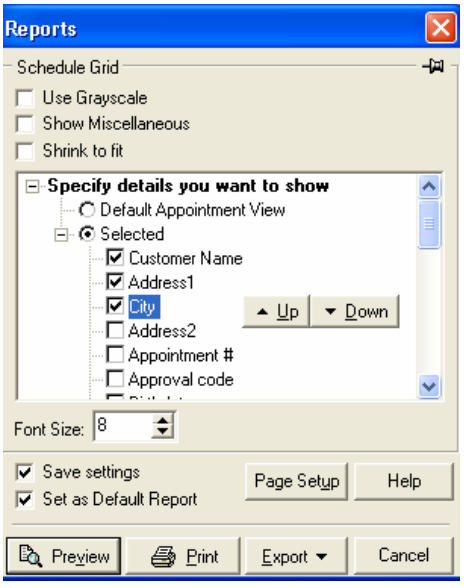
This is your view for ScheduleVIEW™ PLUS.

Select 'Use Grayscale' if you want to print grid in black and white.

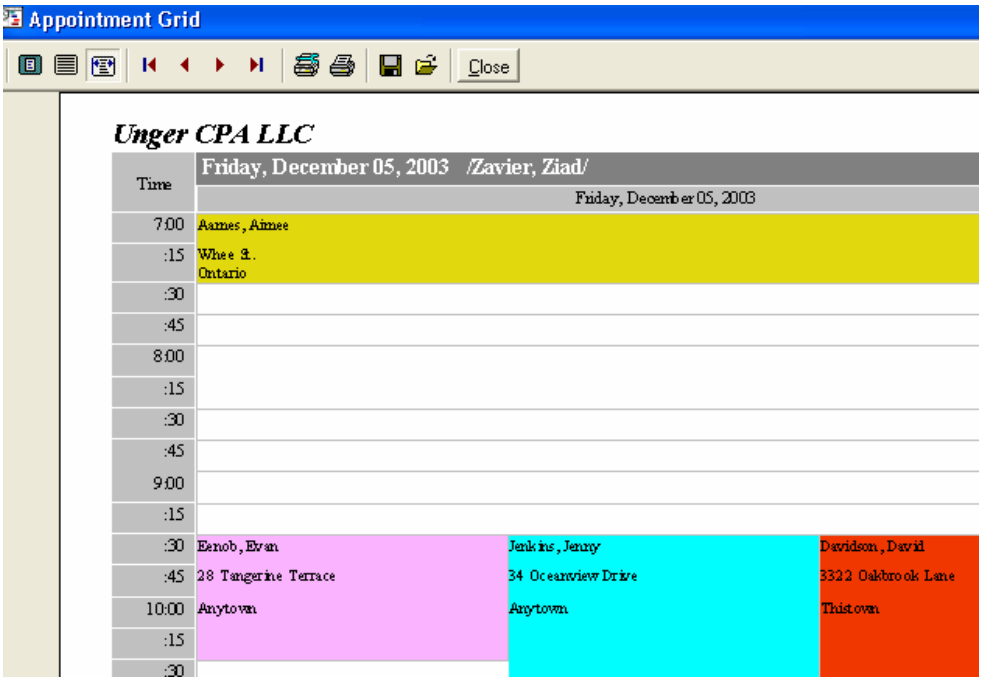
Select 'Show Miscellaneous' to print breaks, etc on the Grid.

Specify Details You Want to show by putting a checkmark by each desired item.

Use 'Up/Down' to put the information in the order you desire. Check 'Save Settings' and your choices will be saved:



Here is an example of your report with ScheduleVIEW™ PLUS.



Click the printer icon at the top of the page to print your report.

➢ AVAILABLE APPOINTMENTS

Description

This report shows the available appointments on the schedule.

Selection Criteria

Select available appointments within a From and/or To Date range.

Select available appointments with specific Providers.

Select available appointments with specific Resources.

Select Grouping by either Name of Provider or Date

Select columns for available timeslots

Select if the report should be printed in pages separated by Grouping.

APPOINTMENT LIST REPORT

Description

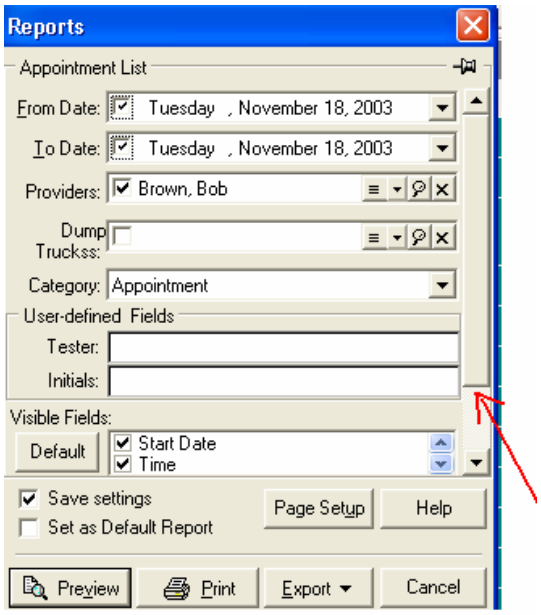
Shows current and historical appointments with levels of detail. This is probably a report you will use daily. It can be printed up and handed to a Provider at the beginning of the day so they will have all the detail needed for their appointments.

➢ APPOINTMENT LIST

Description

Shows current and historical appointments with levels of detail. This is probably a report you will use daily. It can be printed up and handed to a Provider at the beginning of the day so they will have all the detail needed for their appointments.

Selection Criteria



Select appointments within a From and/or To Date range.

Select appointments for specific Providers.

Select appointments for specific Resources.

Select appointments for specific Categories.

VISIBLE FIELDS: (You will need to scroll down to view 'Visible Fields') **This option is not available in ScheduleVIEW™ Lite.** This allows you to pick and choose what information is printed on the report; such as Notes, City, Customer Type, Referral Source, etc. Use the scroll arrows and check the items you would like.

Select Group by 'Name' of Provider or 'Date'.

Here is a sample of your report:

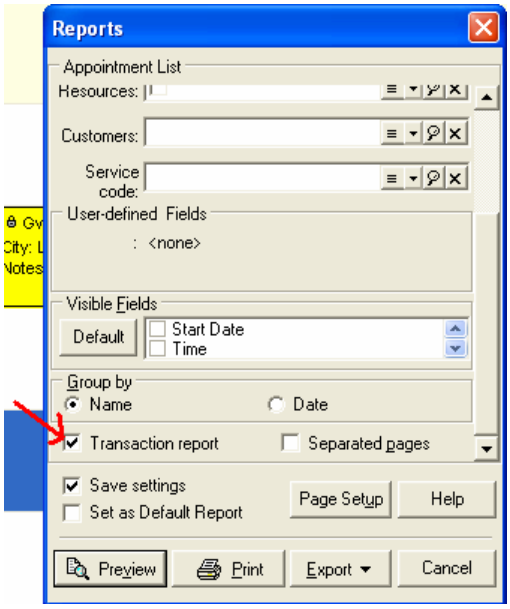
Appointment List

Unger CPA LLC 11/18/2003 4:15:19 p

Provider/Dump	Date,Time	Length	Status	Customer Name and Phone	Servic
Brown, Bob					
#00001331	11/18/2003 10:00 am	90 min	Set	Adams, Andy (555)555-5555	ST0

Providers, Dump Trucks: Brown, Bob
Recurrence: No Repeat
Created: Tuesday, November 18, 2003 4:10:09 pm
Modified: Tuesday, November 18, 2003 4:15:07 pm
Address: 23999 1st Street South
Directions:
Company Name: OneTwoThree Company
Service Code description: Misc Consulting
Customer's type: Accounting
Customer's 2nd phone: (555)555-
City: Anytown
State: FL
Zip: 33950-
Referral source: Telemarketing
Notes: Ask for Norma Namples: 5V Roofing quote. 2500'sq house with vaulted ceilings. Take color samples to show. Also wants quote for shingle roof on the shop.

Visit # : 3
Authorized # of Visits: 9996
Authorization ID:



Select as a Transaction Report--A Transaction report is unique in that it lists the Appointments that were CREATED for the dates specified, not appointments that Occur on the specified dates. For example, today, you may enter 50 appointments; some appointments may be for tomorrow, next week; several weeks from now, and even next year. If you ran an Appointment list for today, and checked the box Transaction Report, the report would show you all the appointments that were entered today, and the appointment dates that they occur on. This is great for tracking changes to the schedule.

Select if the report should be printed in pages separated by Grouping

Tracking: To track when an appointment was made or changed, check 'Created' and/or 'Modified'

Appointment List

The Ploshing Plumber 3/16/2

Staff/Resource	Date,Time	Length	Status	Customer Name and Phone
Ben, Plume				
#00000011				Bobbie, Bonson
	Created:	Tuesday, March 16, 2004 10:35:16 am by Administrator		
	Modified:	Tuesday, March 16, 2004 10:35:16 am by Administrator		
#00000012				Gwenevere, Gustophson
	Created:	Tuesday, March 16, 2004 10:35:22 am by Administrator		
	Modified:	Tuesday, March 16, 2004 10:35:22 am by Administrator		

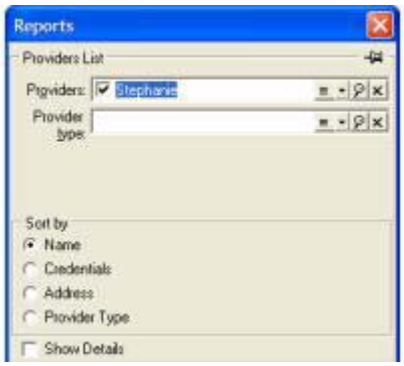
If you are using security and have individual logins for each employee, the transaction report will show WHO created or modified the appts.

➢ PROVIDERS LIST

Description

This report shows how the number of appointments each provider had during a time period.

Selection Criteria



Select specific Providers.

Select specific Provider Types.

Select the sorting criteria for the report.

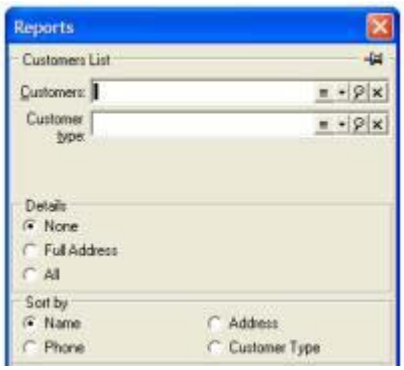
Show Details of each Provider, such as name, address, phone number.

➢ CUSTOMER LIST

Description

This report lists customer information details.

Selection Criteria



Select by specific Customer.

Select by specific Customer Type.

Select whether to print details such as Address or All Customer Information.

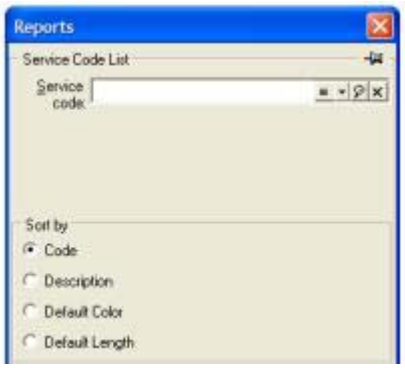
Select Sorting Criteria, by name, phone, address, or customer type.

➢ SERVICE CODE LIST

Description

This report lists Service Code Details.

Selection Criteria

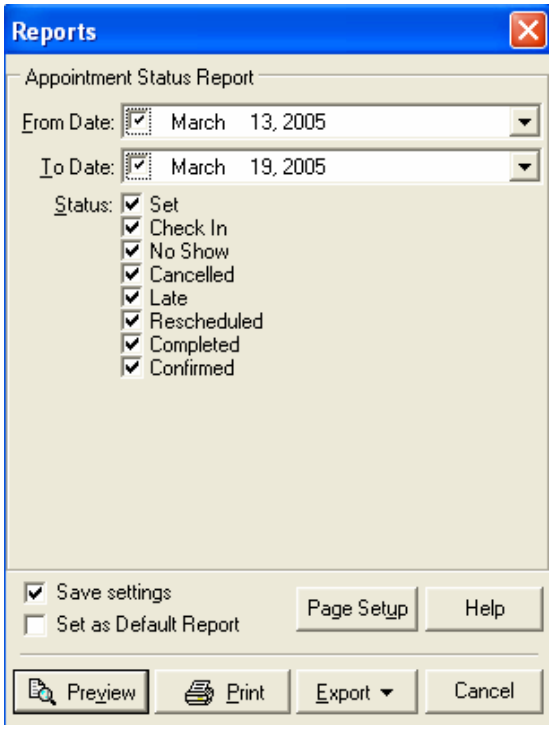


Select Service Code to list – leave empty for all.

Select Sorting Criteria for the report, code, description, default color, default appointment length.

APPOINTMENT STATUS REPORTS

➢ APPOINTMENT STATUS REPORT



Description

This report shows the status of appointments.

Selection Criteria

Select appointments within a From and/or To Date range.

Select Appointment Status.

➢ NO-SHOW REPORT

Description

This report prints out appointments with a No-Show status.

Selection Criteria

Select No-Show appointments within a From and/or To Date range.

Select No-Show appointments with a specific Provider.

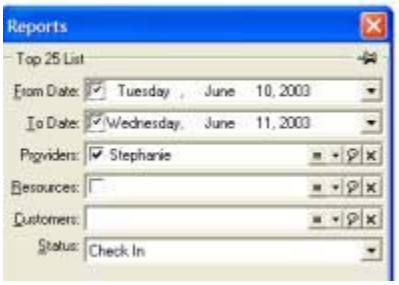
Select No-Show appointments with a specific Resource.

➢ TOP 25 REPORT

Description

This report will show the Top 25 customers in each Appointment Status category.

Selection Criteria



Select appointments within a From and/or To Date range.

Select appointments with a specific Provider.

Select appointments with a specific Resource.

Select appointments with a specific Customer.

Select appointments with a specific status.

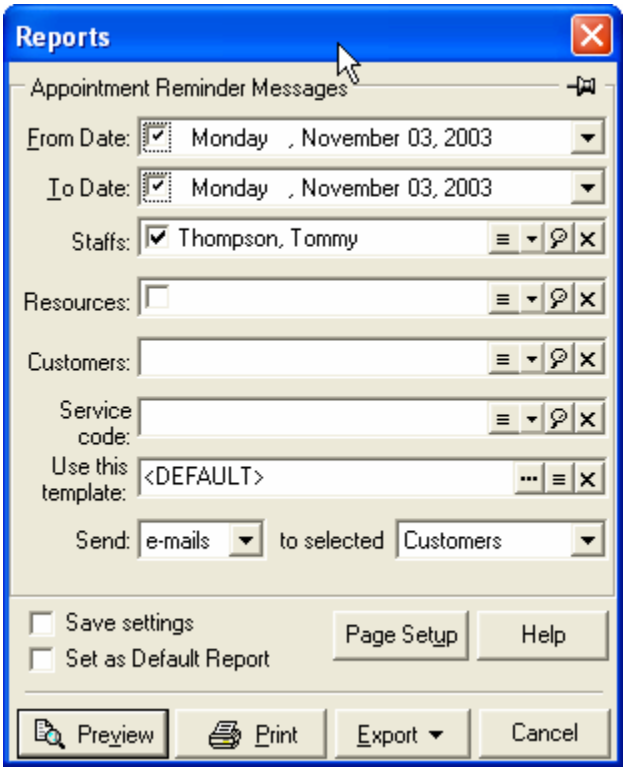
REMINDER REPORTS AND MAIL LABELS

➢ APPOINTMENT REMINDER MESSAGES

Description

This report will print Appointment Reminder Messages to Customers or Providers, reminding them of appointments. This option can also be used to print Superbills; Encounter Forms; Service Orders or other document you design. For a complete tutorial on how to design Appointment Reminders or Superbills or Encounter Forms or Service Orders, please visit www.scheduleview.com/learning.htm

Selection Criteria

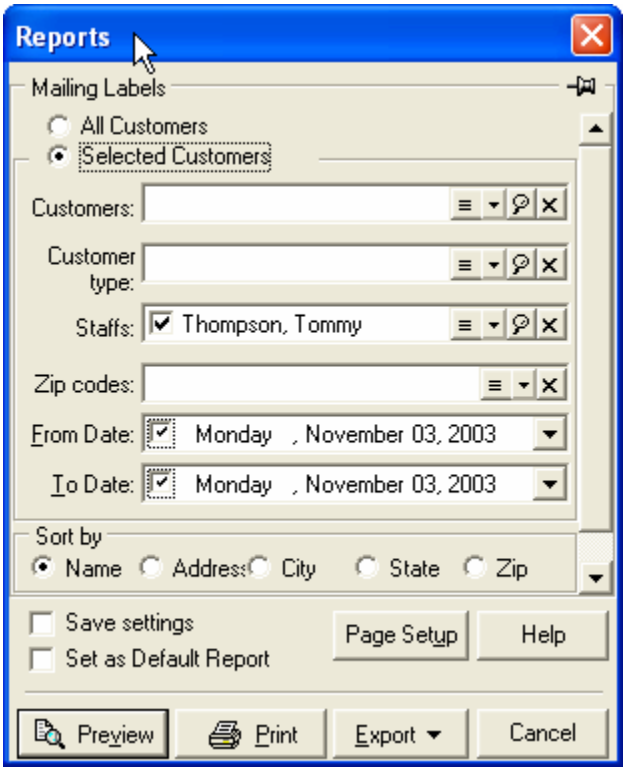


Enter the appointment Date range FROM and TO;
Enter the range of Providers.
Enter the range of Resources.
Enter the range of Customers.
Enter the range of Service codes.
Use this Template: Select the template you want to use for sending these reminder messages. (See Sending Appointment Reminders in this manual)
Send: Select Emails or Letters.
To Selected: Choose Customers or Providers.

➢ MAILING LABELS

Description

Mailing labels can be printed on Avery™ 5160 or compatible labels (Three across, ten down).



Selection Criteria

Select ALL CUSTOMERS or SELECTED CUSTOMERS. If you choose SELECTED, the following additional fields will be available:

Customers: You can enter a range of customers in this field.

Customer Types: If you assigned customer types to the customers as you entered them in, in the ADD\EDIT customer window, then you can select the type of customers you want to print mailing labels for here.

Providers: If you assigned a provider to each customer as you entered them in, in ADD\EDIT customer window, then you can select the range of assigned providers that you want to send the mailing labels to.

Zip Codes: Enter the range of zip codes or leave them blank.

From Date: If you want to send mailing labels to customers that had\have appointments in a specified date range, then enter the beginning date range here:

To Date: Enter the ending appointment date range here.

Sort by Settings: Choose to sort names by Name; Address; City; State; or Zip Code.

Save Settings: Check if you want these setting to be saved so you do not have to reenter them each time you run this report.
Save as Default Report: Check here if you want this to be your default report.

MAKING LABELS WITH DYMO® LABELWRITER

Now, easily print appointment reminders labels, address or mailing labels, or any other kind of labels for your customers or appointments. ScheduleVIEW™ allows you to setup or format two labels; we call one an 'Appointment Label' and the other a 'Customer Label'.

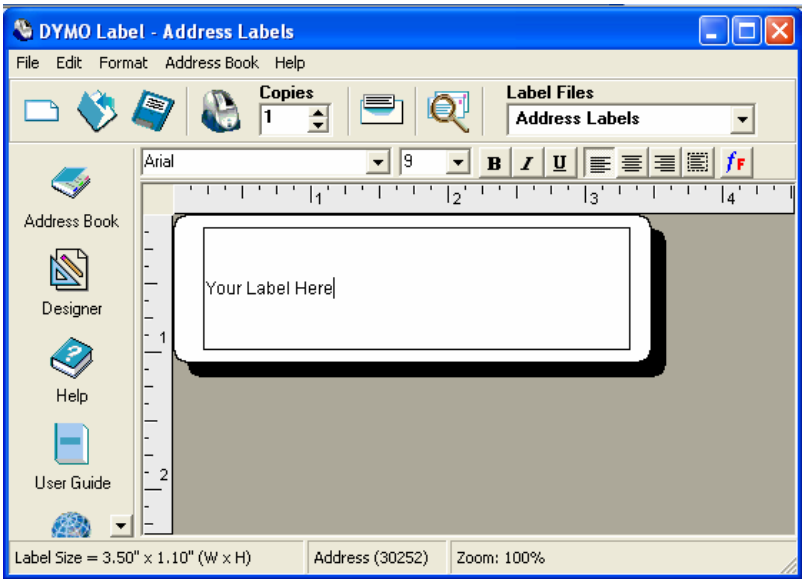
This feature allows you then to click on one of these label buttons when editing an appointment, and then print that label. You can also click on the customer label button when editing a customer to print an address or mailing label. You can format the labels any way you want; for example a medical office could use one of the labels for printing chart labels.

You can purchase a Dymo® LabelWriter printer model 330 at most office supply stores such as Office Depot; Office Max; or Staples for around $99. For a better and faster printer, you can also purchase the Dymo Turbo 330 at WWW.LABELCITY.COM for around $99.

There are a couple labels that we really like for printing appointment reminders. One is the "REMOVEABLE" labels at www.labelcity.com . These labels are like the yellow sticky notes and can be removed and reapplied on a calendar—great for your customers. The other label we really like is the "Appointment Labels" Dymo part # 30374. The really nice feature of this label is that it is non-adhesive, like a business card. This label\card can be used to print the customer's next appointment information.
Recommendations\Requirements: We recommend and support only the Dymo 330 and 330 Turbo models. You MUST have the Dymo® LabelWriter printer software installed on your computer in order for our software to interface with the Dymo Printer.

YOU MUST HAVE SCHEDULEVIEW™ STANDARD OR PLUS TO BE ABLE TO PRINT A DYMO® LABEL

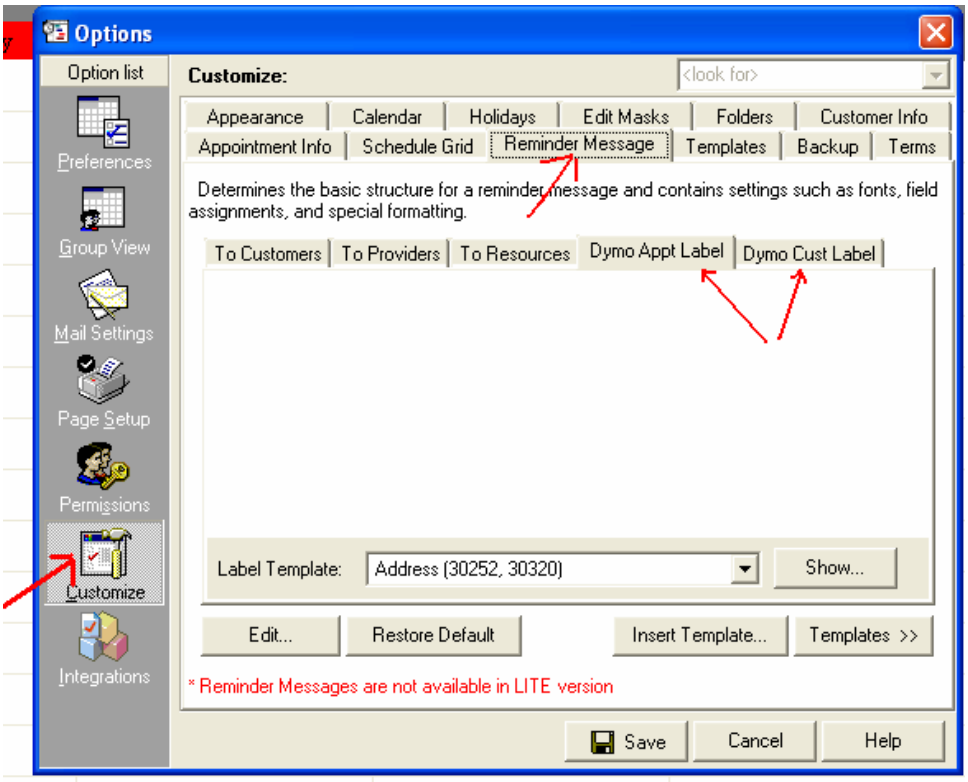
Dymo Appt Label



You must have the DYMO® LabelWriter installed on your computer to use this ScheduleVIEW™ function.

We recommend and support only the Dymo 330 and 330 Turbo models.

Open ScheduleVIEW™ to your calendar and Click on 'File' ; 'Options' ;

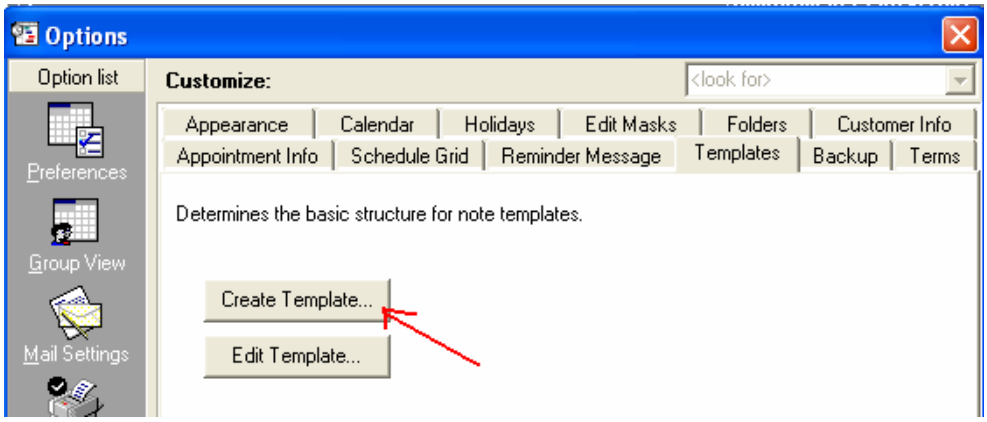


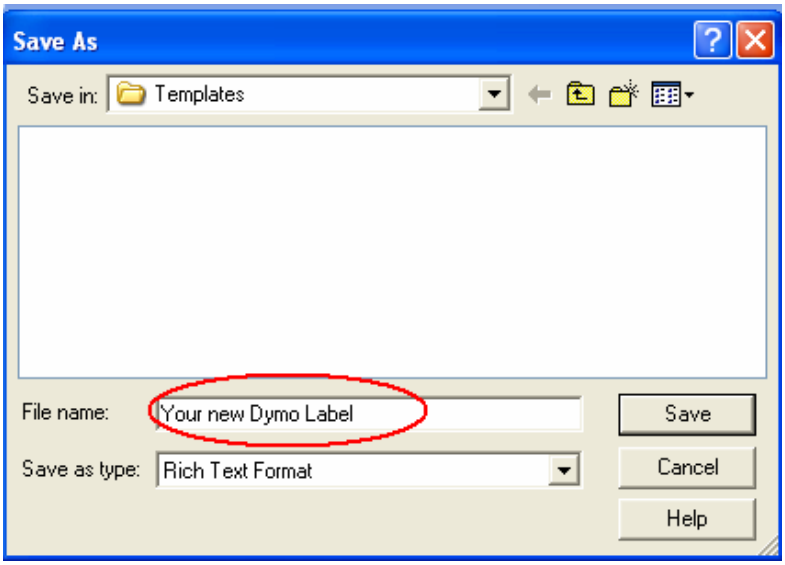
'Customize';
'Reminder Messages';
and then
'Dymo Appt Label'
-- or --
'Dymo Cust Label'

(For this example we have used Dymo Appt Label)

Click on 'Templates >>'

Click on 'Create Template'



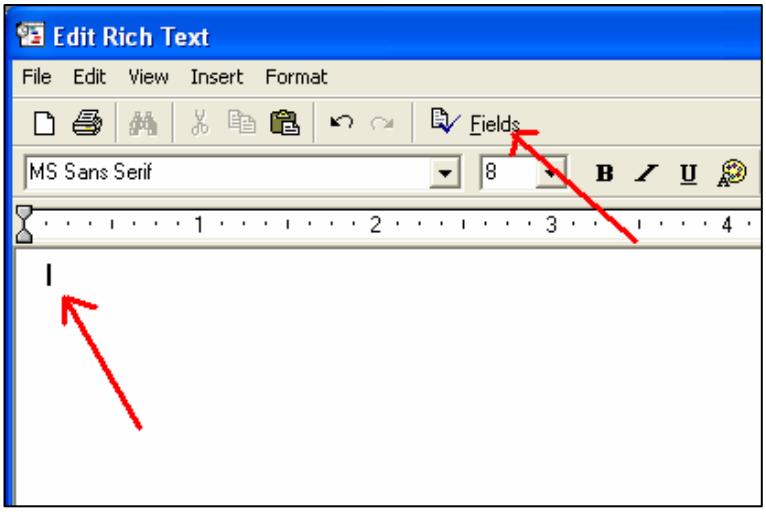


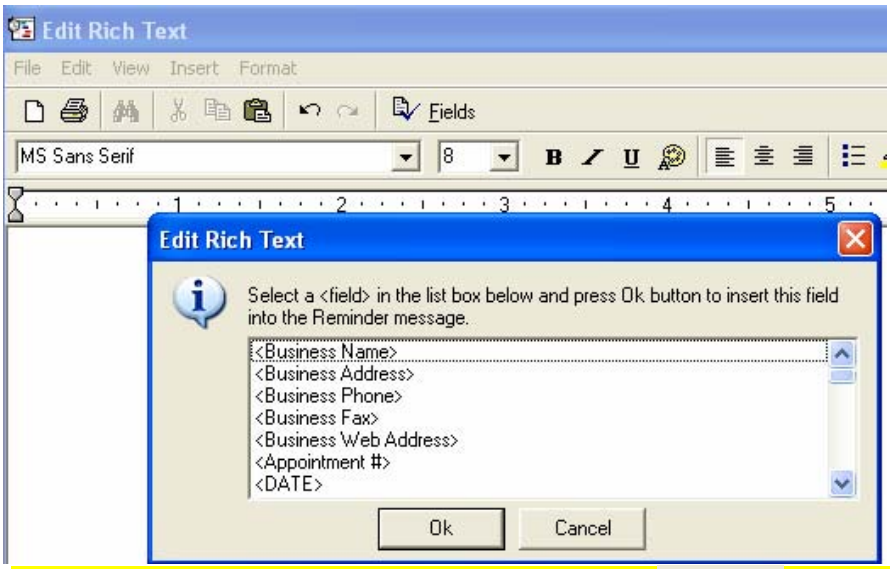
Type in a name for your new label and click 'Save'

This takes you to 'Edit Rich Text'

In order to add information from the customer database or appointment screen move your cursor on the screen in the location you wish the information to insert.

Click on 'Fields' icon which is located on the menu bar.





This gives you a drop-down list of fields you may merge customer or appointment information from.

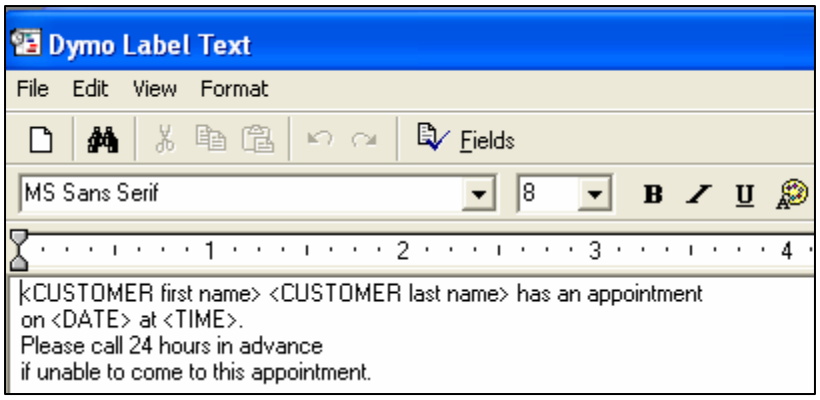
Highlight your choice and click 'OK' and the field will insert.

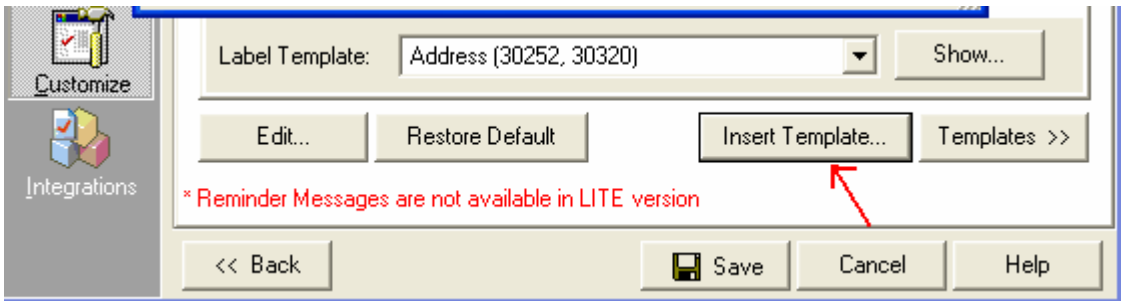
Repeat this for all the fields you wish.

Make sure you have a space on each side of the Fields brackets < >, and the text, to format properly.

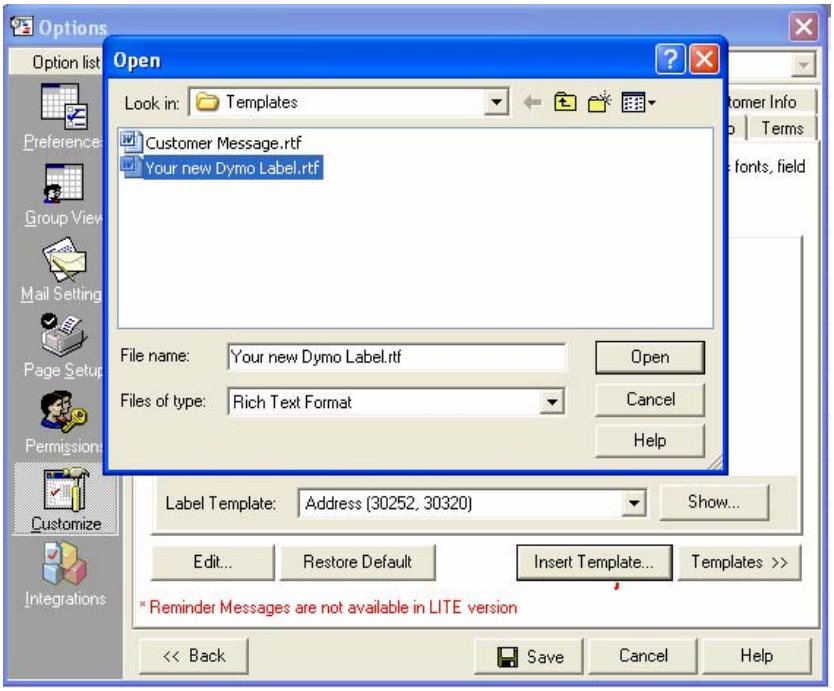
Here is an example of an appointment reminder:

When you are finished
Click 'File'
'Save and Exit'





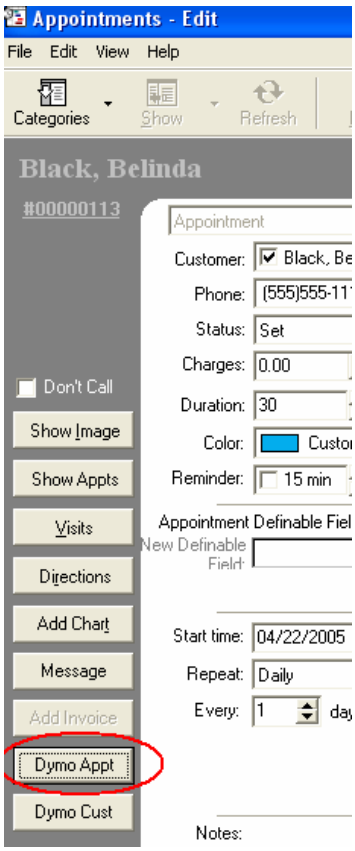
Click 'Insert Template'



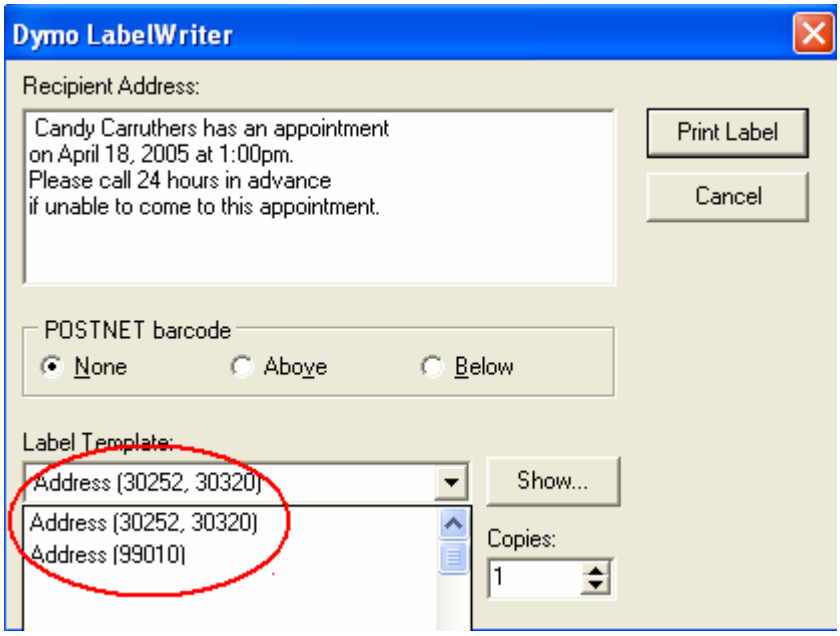
Choose your new template and 'open'

Now click 'Save'

When your customer is ready to leave you can now print up an appointment reminder sticker and hand it to them. To do this, Edit their appointment



Click on the 'Dymo Appt' icon



You will get a preview of the label:

Make sure you have chosen the correct 'Label Template' for your Dymo® LabelWriter.

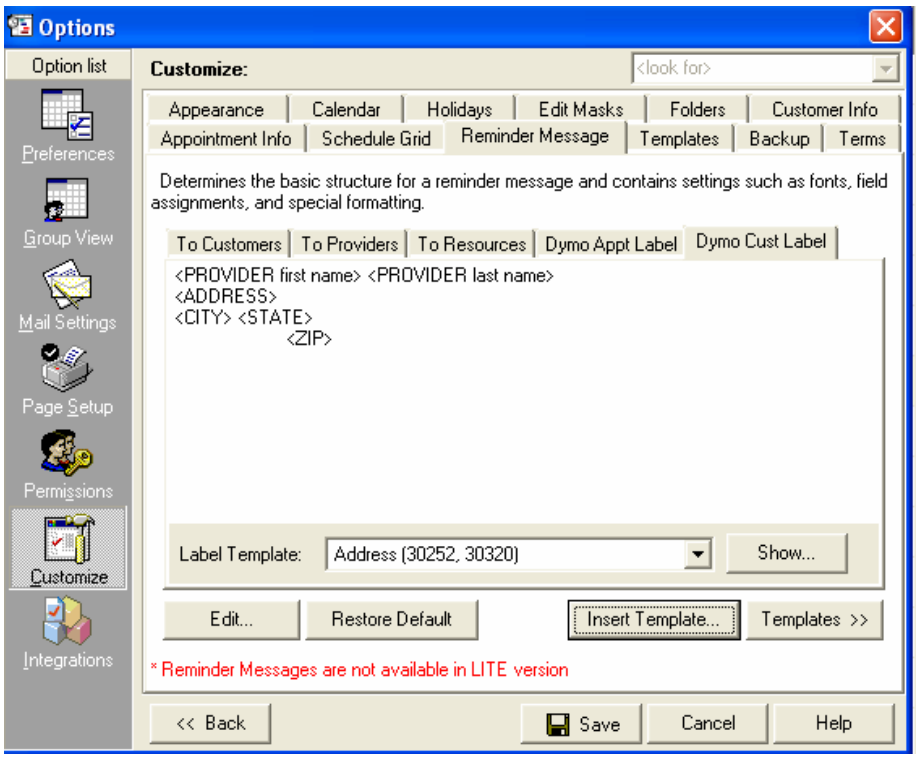
Please note, this is not a ScheduleVIEW™ setting, it is a Dymo® LabelWriter setting and depends upon the label size you have loaded into your printer

Click 'Print Label' to print

Dymo® LabelWriter software uses shrink to fit technology. We recommend formatting your label with short widths and multiple lines so they are more legible. See the examples below:

Belinda Black has an appointment on April 22, 2005 at 9:30am.
Please call 24 hours in advance if unable to come to this appointment.

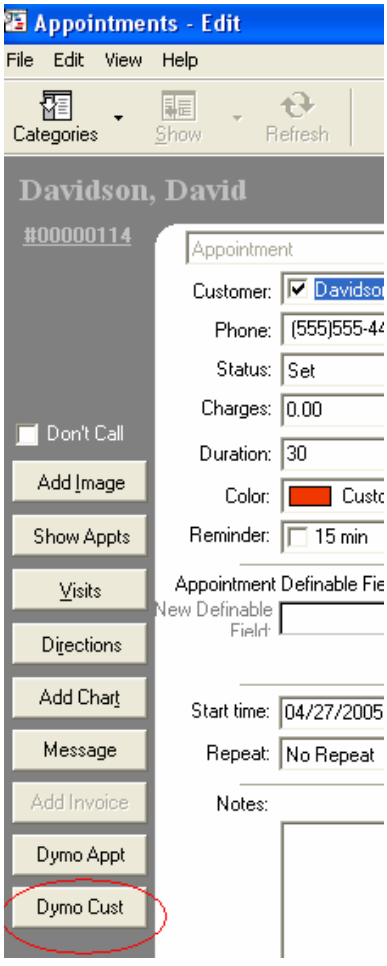
Belinda Black has an appointment on
April 22, 2005 at 9:30am.
Please call 24 hours in advance
if unable to come to this appointment.



Dymo Cust Label

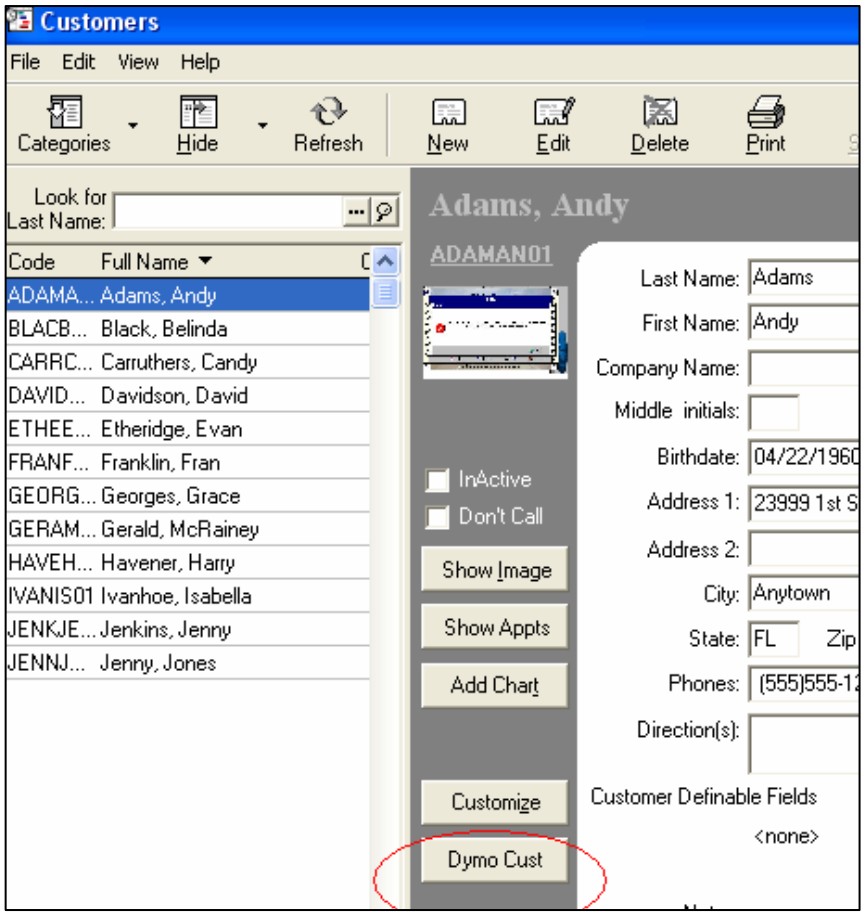
Is usually used for address labels or chart labels:

There are 2 places you can access the 'Cust Label':

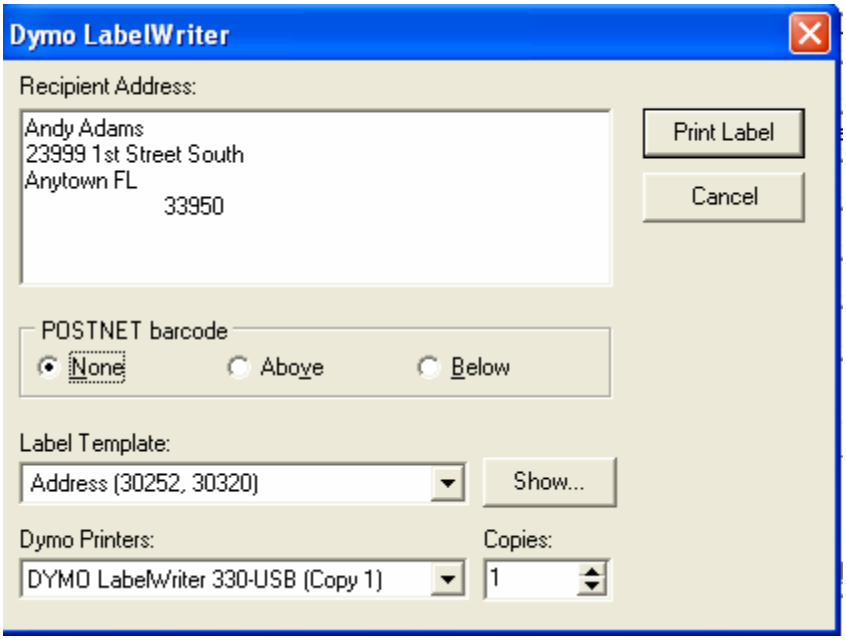


1. Edit the appointment and Click on 'Dymo Cust'

2. Edit the Customer and click on 'Dymo Cust'



Here is an example of your label:

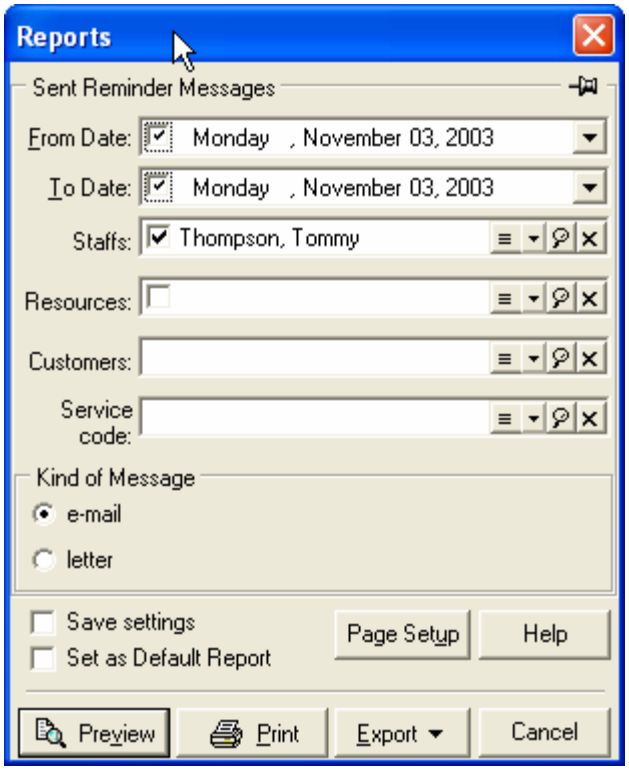


➢ SENT REMINDER MESSAGES

Description

This report shows you a list of customers or providers that email reminders were sent out to on the specific date range. You can choose to show either emails or letters that were sent.

Selection Criteria



Enter the date range FROM and TO for this report.

Enter the range of providers.

Enter the range of resources.

Enter the range of customers.

Enter the range of service codes.

Specify if you want the report to show emails that were sent or letters.

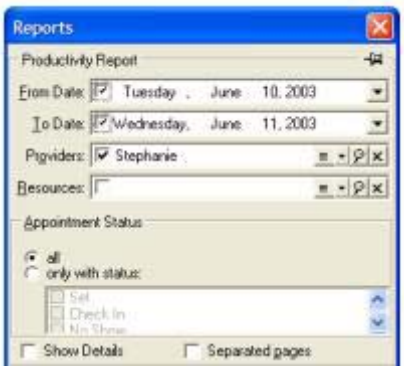
PRODUCTIVITY AND REVENUE REPORTS

➢ PRODUCTIVITY REPORT

Description

This report shows the productivity of Providers by calculating the Total Appointment Time versus Total Available Time of each Provider for appointments less breaks. If a provider only works certain days or parts of a day, then block off the time they are not available with a BREAK in order for this report to work correctly.

Selection Criteria



Select available time within a From and/or To Date range.

Select available time for a specific Provider.

Select available time for a specific Resource.

Select appointments with specific appointment statuses or all.

Please note: Selecting **Show Details** will print out details of all the appointments that meet these specified criteria.

Separated pages will produce a report for each provider on a separate page.

➢ REFERRAL SOURCE REPORT

Description

This report shows appointments by referral source, allowing you to determine the effectiveness of your marketing campaigns and techniques.

Selection Criteria

Select appointments within a From and/or To Date range.

Select appointments for a specific Provider.

Select appointments for a specific Resource.

Select appointments for a specific Referral source

Select appointments for a specific Zip Code

Select appointments for a specific Service Code.

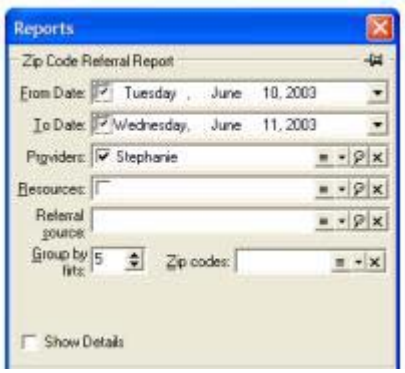
Please note: Selecting **Show Details** will print out details of all the appointments that meet these specified criteria.

➢ ZIP CODE REFERRAL REPORT

Description

This report shows appointments by the zip code of your customers, allowing you to determine where your customers are located and how you might best service those geographical areas.

Selection Criteria



Select appointments within a From and/or To Date range.

Select appointments for a specific Provider.

Select appointments for a specific Resource.

Select appointments for a specific Referral source

Select appointments for a specific Zip Code

Group by the FIRST X digits; meaning you want to sort or group by the first X number of digits in the zip code; for example you may want to group by the first two digits or three digits. Please note: Selecting **Show Details** will print out details of all the appointments that meet these specified criteria.

➢ AUTHORIZED VISIT ALERT REPORT

Description

This report shows which Customers are close to completing their number of authorized visits.

Selection Criteria

Select appointments within a From and/or To Date range.

Select appointments for a specific Provider.

Select appointments for a specific Resource.

Select a number or range of visits.

Please note: Selecting **Show Details** will print out details of all the appointments that meet these specified criteria.

➢ REVENUE GENERATION REPORT

Description

This report shows how much revenue has been generated during a time period using various selection and subtotaling criteria. The "revenue" comes from the amount that you enter in the Appointment ADD\EDIT window, "Charges" field.

Selection Criteria

Select revenue generated within a From and/or To Date range.

Select revenue generated for a specific Provider.

Select revenue generated for a specific Resource.

Select revenue generated for a specific Customer.

Select revenue generated for a specific Service Code.

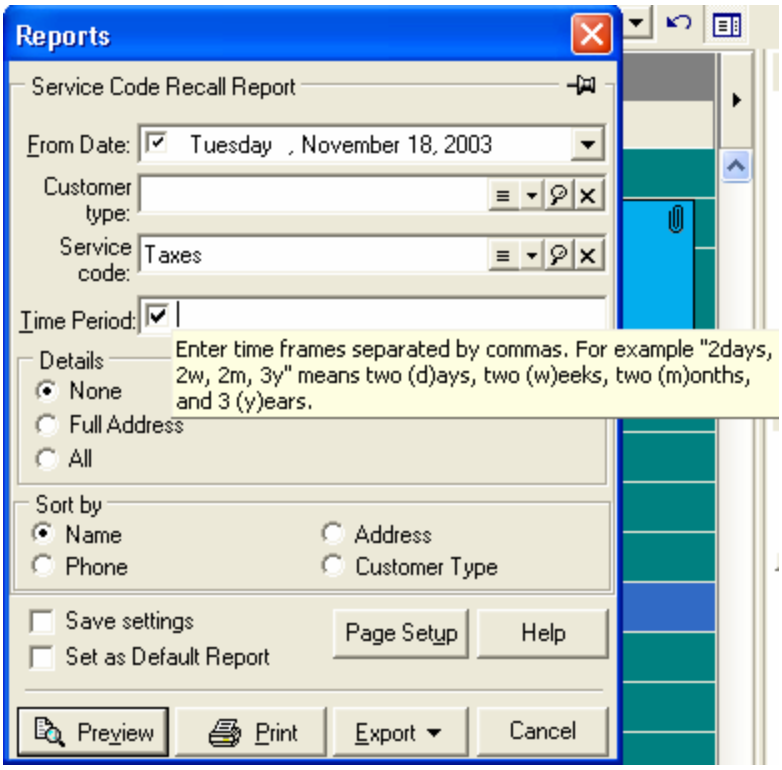
Group information by Zip Code.

Subtotal by Provider, Resource, Day, Zip Code, Referral Code, or Service Code.

SERVICE CODE RECALL REPORT

Description

This report shows which of your Customers have not had recent appointments for specific services so that you may follow-up to schedule appointments. This is perfect for a pest control company to make sure the semi-annual checks have been performed, or a tax company, or for any business which has follow-up appointments.



Selection Criteria

Select activity from a specific date.

Select Customer Type

Select Service Code

Select Time Period - This date is from the selected 'From Date' BACKWARDS in time. As an example, a hygienist sees patients every 6 months; if you put 6 months, then the report would show everyone who has NOT had and appointment in the last 6 months.

Select Customer Details to print out.

Select Sorting Criteria.

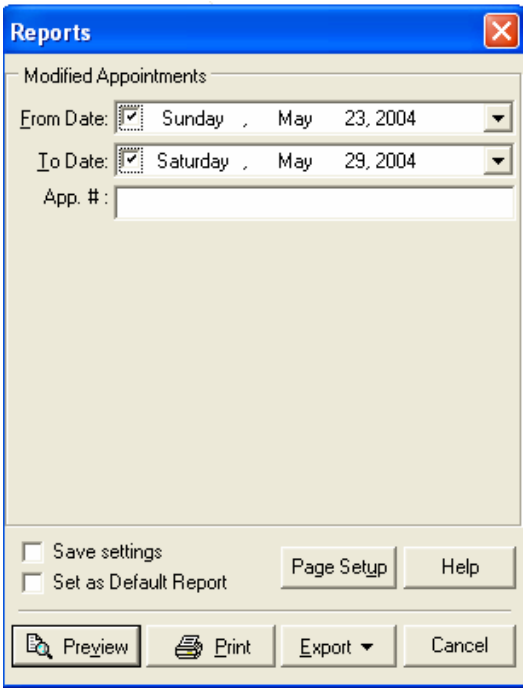
2. The most common error is thinking that it runs using the service code attached to the customer information. It does not do this - for example: I run a report for a 'yearly checkup' in my medical office - it will show every customer who has not had an appointment with the service code of 'yearly checkup'. That patient may have been in for other service codes and it will still show up on the report because of this.

MODIFIED APPT REPORT: TRACKING CHANGES

➢ TRACKING CHANGES/DELETIONS/MODIFICATIONS IN YOUR SCHEDULE.

This quick report will show you when Appointments have been modified and whether they have been deleted. **This report will only track changes if you have security enabled.**

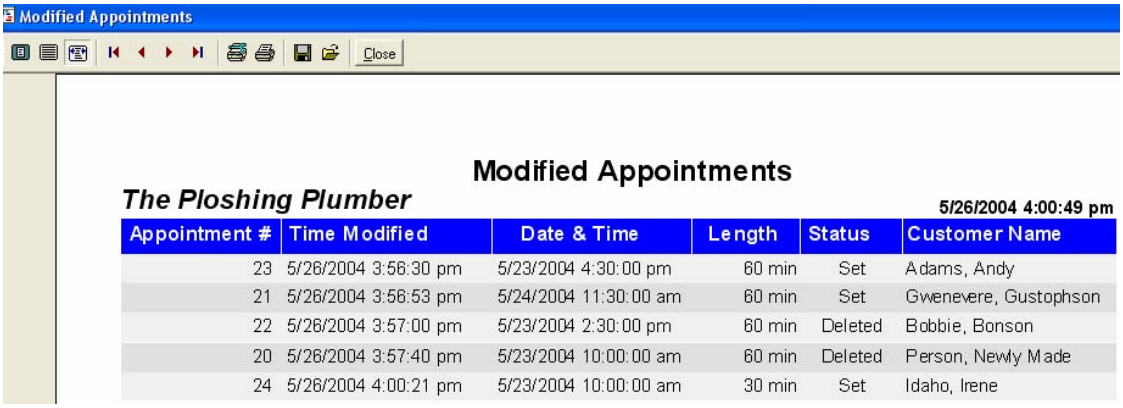
Click on 'Reports' 'Modified Appointments'



If you were in a Weekly View, your report will automatically generate for the week.

Click on 'Preview'

Here is a sample report:



Appointment #	Time Modified	Date & Time	Length	Status	Customer Name
23	5/26/2004 3:56:30 pm	5/23/2004 4:30:00 pm	60 min	Set	Adams, Andy
21	5/26/2004 3:56:53 pm	5/24/2004 11:30:00 am	60 min	Set	Gwenevere, Gustophson
22	5/26/2004 3:57:00 pm	5/23/2004 2:30:00 pm	60 min	Deleted	Bobbie, Bonson
20	5/26/2004 3:57:40 pm	5/23/2004 10:00:00 am	60 min	Deleted	Person, Newly Made
24	5/26/2004 4:00:21 pm	5/23/2004 10:00:00 am	30 min	Set	Idaho, Irene

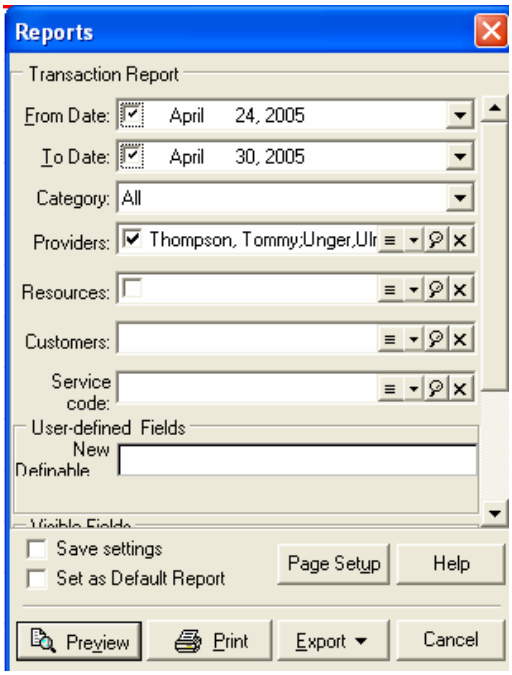
TRANSACTION REPORT: TRACKING CHANGES

➢ TRACKING CHANGES/DELETIONS/MODIFICATIONS IN YOUR SCHEDULE – AND WHO MADE THEM

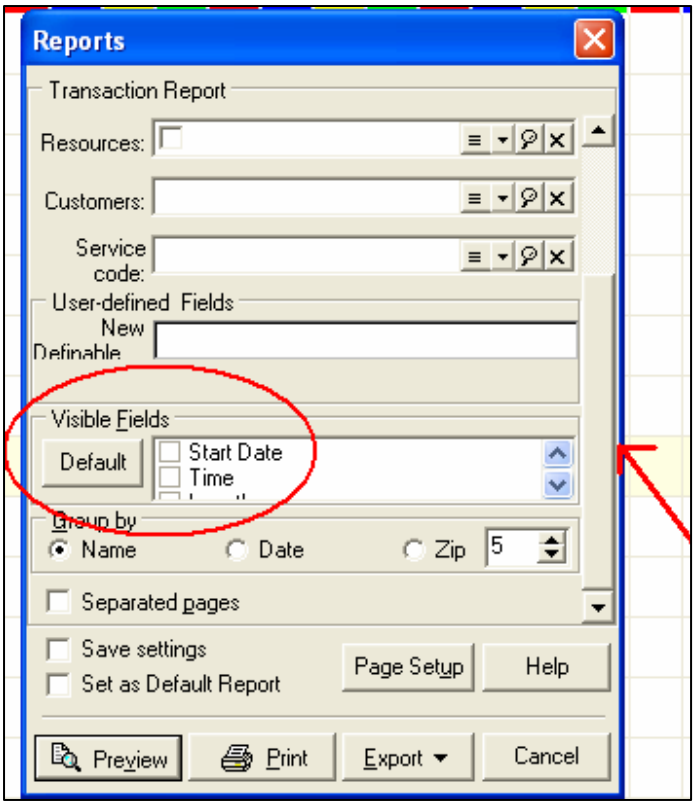
Transaction report is great for more detail or to track your employees' scheduling changes/modifications. Transaction report is unique in that it lists the Appointments that were CREATED for the dates specified, not appointments that Occur on the specified dates. For example, today you may enter 50 appointments; some appointments may be for tomorrow, next week, several weeks from now, and even next year. If you ran a Transaction Report, the report would show you all the appointments that were entered today, and the appointment dates that they occur on.

This report will only track changes if you have security enabled.

Click on 'Reports' 'Transaction Report'



Select appointments within a From and/or To date range.
Select appointments with specific Providers.
Select appointments with specific Resources.
Select appointments with specific Categories.



Scroll down to 'Visible Fields'.

VISIBLE FIELDS: This allows you to pick and choose what information is printed on the report; such as Notes, City, Customer Type, Referral Source, etc. Use the scroll arrows and check the items you would like.

Group by: 'Name' of Provider or 'Date'.
Separated Pages: Select to have the report printed in pages separated by Grouping.

The transaction report will show WHO created or modified the appointments if:

1. Security logins with passwords are used.
   (See section on Security/Permissions in this manual)
2. Individual login and password is used for each employee
3. Make sure you checkmark 'Created' and 'Modified' in the 'Visible Fields'

Appointment List

Unger CPA LLC

04/27/2005 3:16:25 pm

Provider/Resource	Date,Time	Length	Status	Customer Name and Phone	Service
Unger, Ulma					
#00000120	04/27/2005 2:15 pm	30 min	Set	Black, Belinda	ST01
	Created: April 27, 2005 2:49:07 pm by Administrator				
	Modified: April 27, 2005 2:49:07 pm by Administrator				
Wallace, Wendy					
#00000121	04/28/2005 2:45 pm	30 min	Set	Etheridge, Evan	ST01
	Created: April 27, 2005 2:49:15 pm by Administrator				
	Modified: April 27, 2005 2:49:15 pm by Administrator				

CUSTOMIZING ScheduleVIEW™

ScheduleVIEW™ gives you a variety of ways of customizing views to best fit the needs of your company. To begin customizing, sampling select **File** from the **Main Menu**, then **Options.** This brings up Options Window, which has the following seven, buttons on the left:

Preferences Click here to set up your business name, work time and date parameters.

Group View Click here to add, edit, or delete group views.

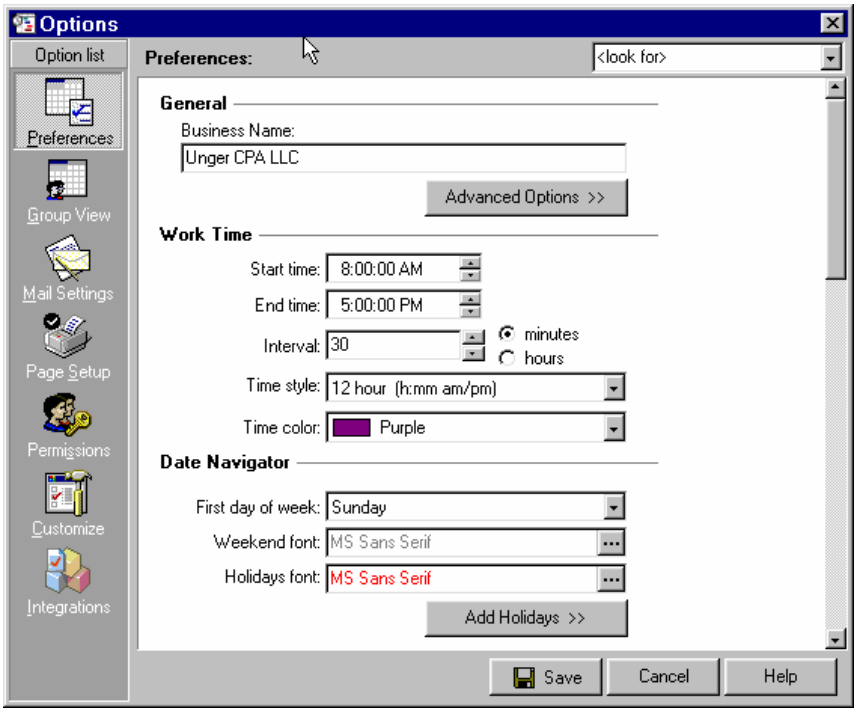
Mail Settings Click here to set up your mail and email options.

Page Setup Click here to set up your printer options.

Permissions Click here to set up your security for **ScheduleVIEW™**

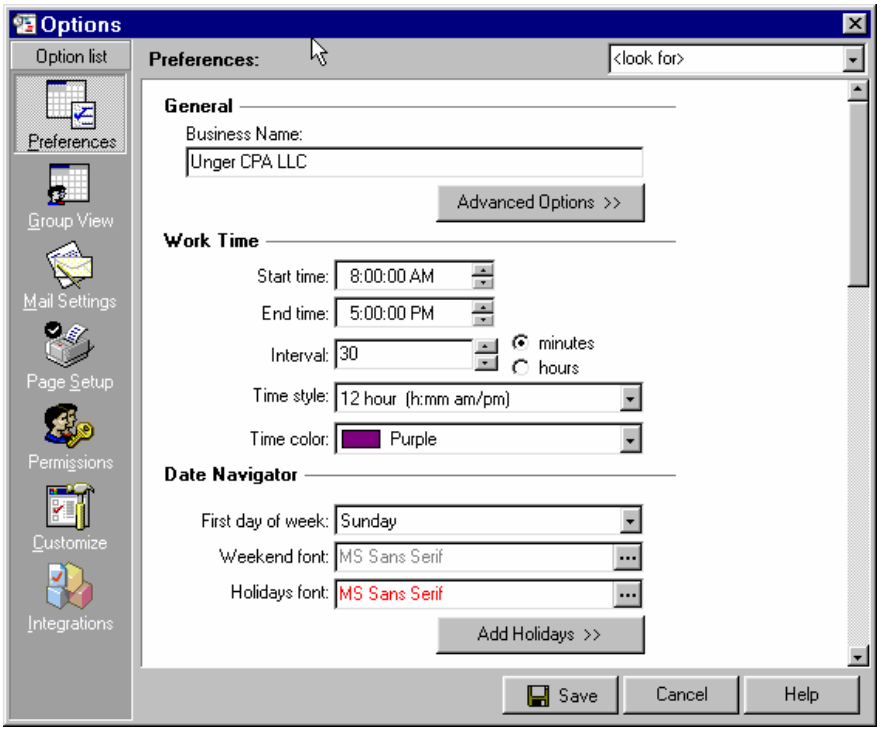
Customize Click here to customize your **ScheduleVIEW™** windows.

Integrations Click here to set up your interface with **QuickBooks.**



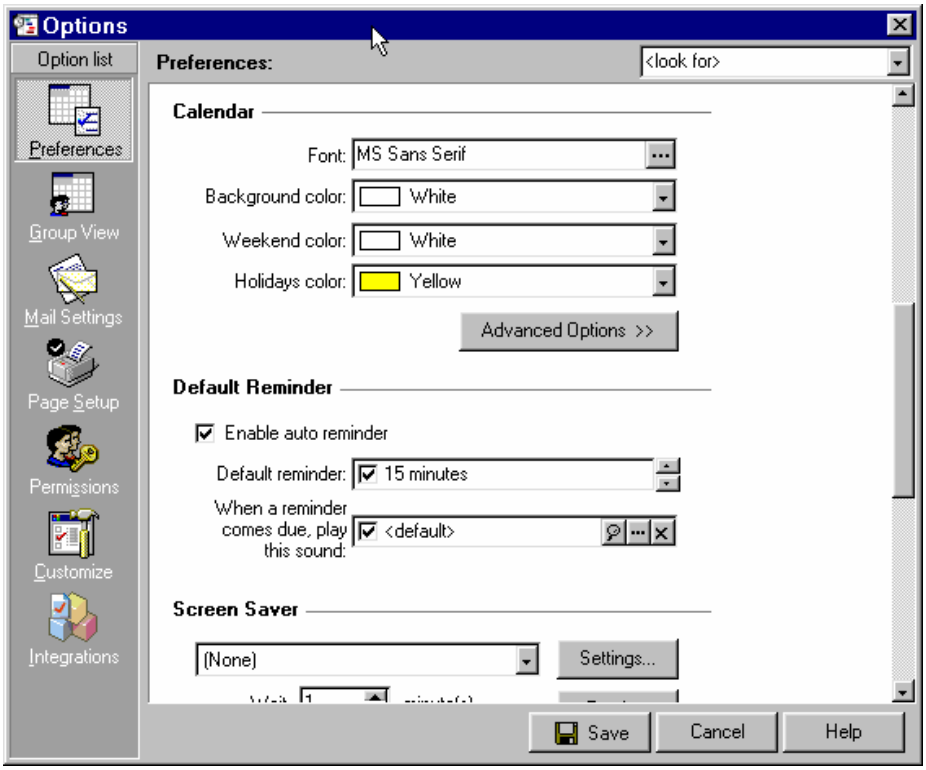
Preferences

ScheduleVIEW™ allows you to set up its program, reporting, and calendar the way that you run your business. The first step in customization is to define general parameters selecting **Preferences** from the **Options Toolbar**.



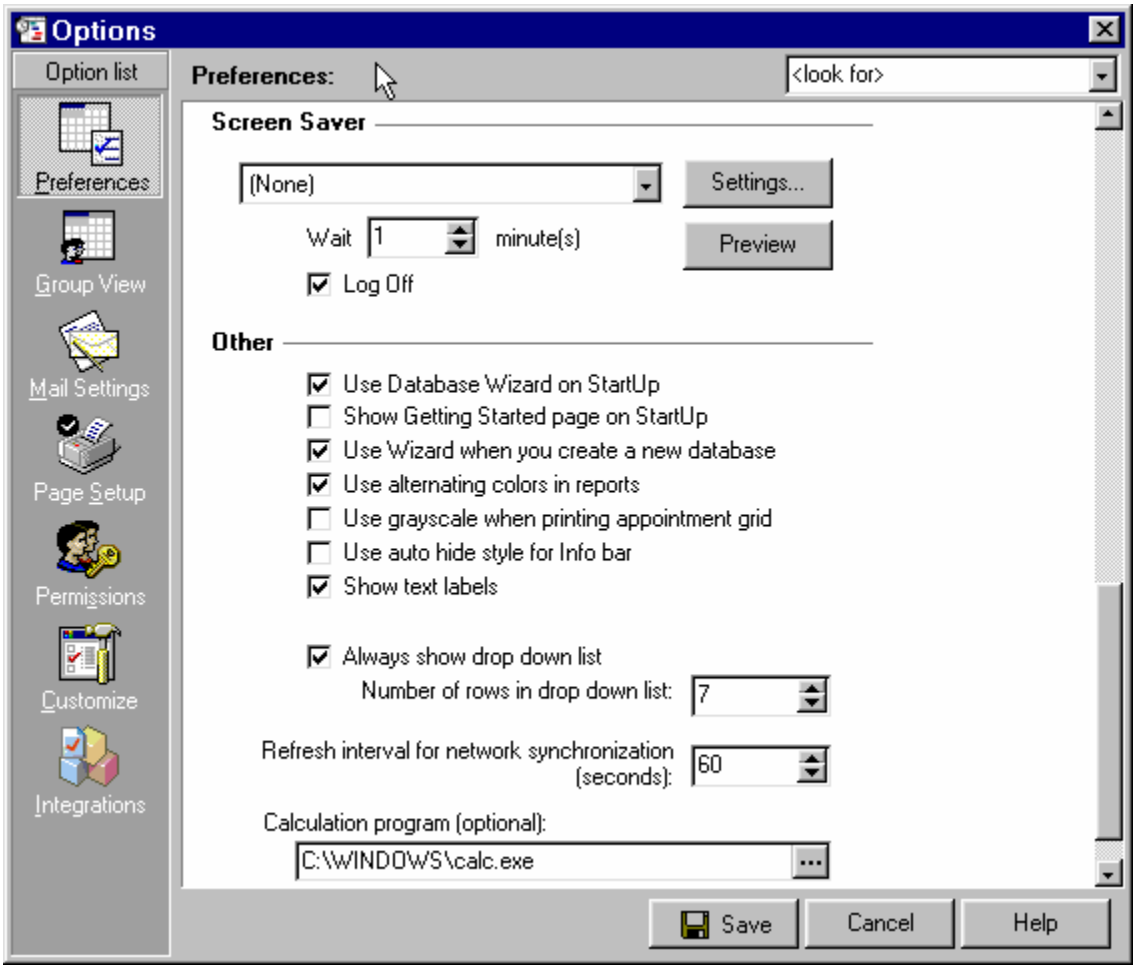
Input your company name here, as well as your work times, your typical appointment intervals, 12 or 24-hour time style, colors, and days of the week and fonts. **PLEASE NOTE: **ScheduleVIEW™ will not cross the dateline.** If you are open 24 hours a day or are open all night, your start time and end time must be on the same day. You will need to choose a start time of 12:00am and an end time of 11:59pm. (**ScheduleVIEW™** will not work properly if you have a start time of 8:00pm and an end time of 6:00am because that is 2 different days/dates)

Scroll down further and you will find these settings:



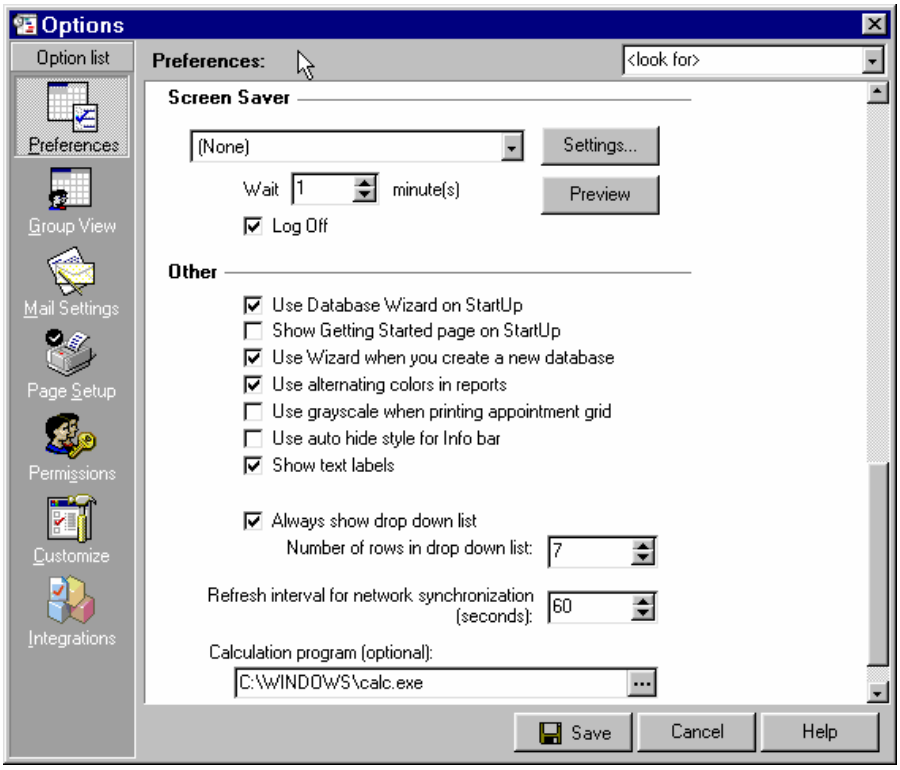
Calendar: Enter the font and colors for the Main calendar; and for Weekend Colors and Holiday Colors;

Default Reminder: Check the "Enable auto reminder" if you want the system to automatically create a reminder for each appointment you make. Once you check this box, indicate the default lead time you want for the reminders, and then select a default "windows sound" in "When a reminder comes due, play this "sound" box.



Screen Saver: If you are concerned about privacy and security, (Especially medical offices as it relates to HIPAA), you can enable a screen saver so that information will not be seen on the screen by people that walk by your computer. If you do not want this enabled, leave the setting in "Screen Saver" set to NONE. If you do want to enable it, click on the "SETTINGS" button, then click on the drop down arrow, and select the type of screen saver you want enabled on this computer (note, this will enable the screen saver for all applications on your computer, all the time). Some screen savers have customized options that you can change by clicking on the "SETTINGS" button after selecting the screensaver type. If nothing happens when you click "SETTINGS", then you cannot customize that screen saver. Next, select the amount of time you want the system to wait for mouse and keyboard inactivity, before starting the screen saver.

Log Off: If you have security enabled on your database, then you have the option to also automatically "Log Off" users when the screen saver becomes active, and then to get back into **ScheduleVIEW™** users would be required to log back on with their user name and password. It is recommended that you activate security and screen savers and checking this box if you are concerned about database privacy and security (Also recommended for HIPAA compliancy).



Other:

Use Database Wizard on Startup: Check this box and when **ScheduleVIEW™** starts up, you will be prompted with this kind of screen: (NOTE: if you do not enable this Wizard, **ScheduleVIEW™** will automatically open to the last used database. If you want, you can force this window to come up when you start **ScheduleVIEW™** by pressing and holding down the F8 key while clicking on the **ScheduleVIEW™** icon to start.)

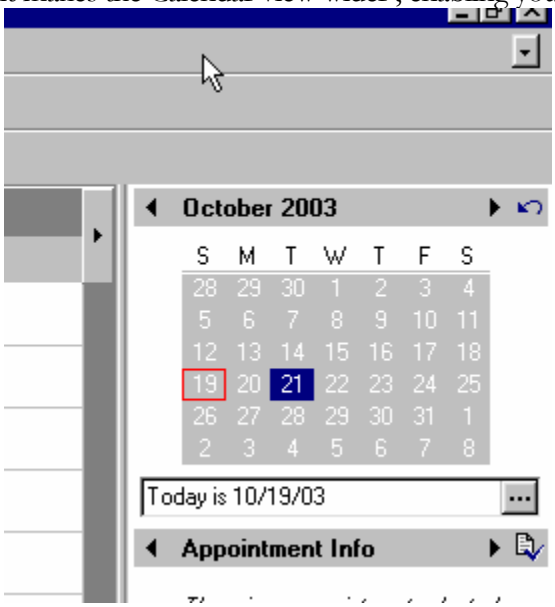
Show getting Started Page at Startup: If this is checked, you will get the "Welcome to **ScheduleVIEW™ "** screen at startup . To disable this screen, and go straight to the calendar screen, leave this unchecked. There is a checkbox at the top of this screen that if you check it, then this screen will not show again at startup.

Use Wizard when creating a new database: Please leave this always checked.

Use alternating colors in reports: Leave this checked to provide better viewing of reports.

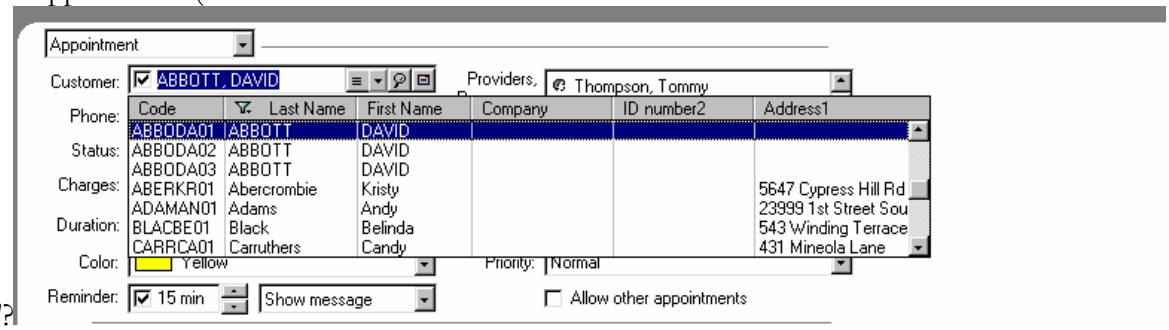
Use grayscale when printing reports: If you print on a black and white printer, enable this feature for better printing results.

Use auto hide style for status bar: If this is enabled, the "Info Bar Column" on the right of the main screen that looks like the following, will "Auto Hide". (This is great for a business with many providers as it makes the Calendar view wider , enabling you to view more providers across the screen.)



Show text labels: Click here to show text labels on the icon bar to show like this: (notice the text such as "Make Appointment" or "Find Slot" next to the icons?)

Always show drop down list: This feature determines IF when you start typing in a customer name, a drop down box should show that matches the letters you've started typing. For example, if you start typing the letter "A" and this is enabled , your screen would look like this when typing in a customer name for an appointment:(See how there is a list below the customer name with customers that match the letter "A"?



Refresh Interval: When **ScheduleVIEW™** is networked, it looks to the network database for updates and changes and new appointments. This setting determines how often that "refresh" should take place. The lower the number the more frequently **ScheduleVIEW™** will check the database; however, this can cause extra network traffic and slow down your system on slower computers and slower networks. For fast networks, we recommend lowering this down to 15 seconds. For slower networks, we recommend 60 seconds.

Calculation Program: ScheduleVIEW™ uses a calculator in the "Charges" field of the appointment for you to enter how much money you charged the customer for this visit or how much you collected, but not both. To calculate an amount, you can click on the "Calculator" icon next to this field in the appointment window to use a calculator; by default we use the "windows" default calculator. If you want to use a different calculator, specify it here.

Click on **Save** to save your general preferences.

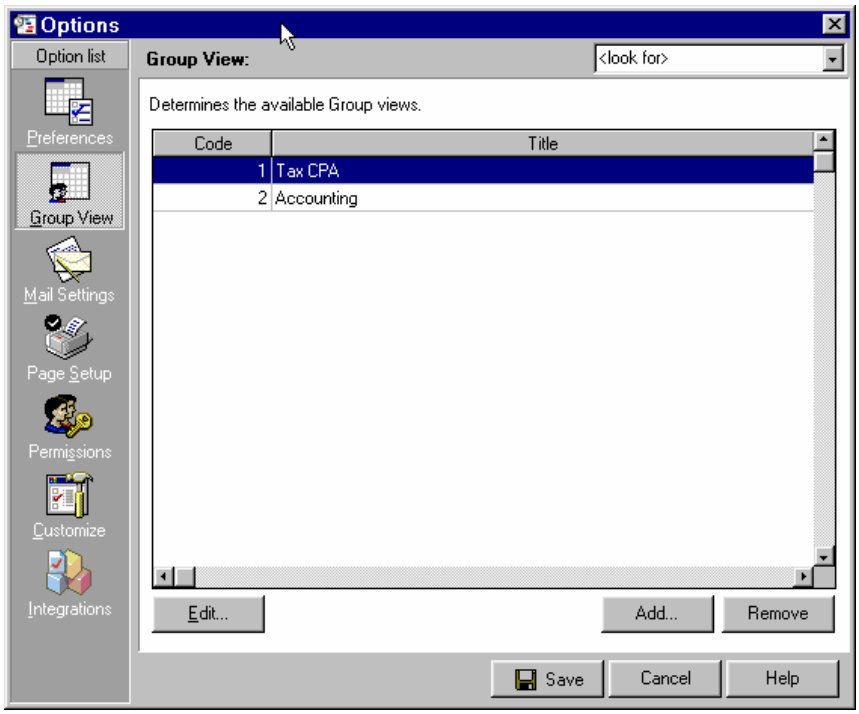
Advanced Options will take you into **Mail Settings**.

Add Holidays will take you into the **Customize** process.

GROUP VIEW (COLUMN VIEW)

A "Group View" is a collection or group of providers and or resources that you want to view together on the screen, side by side.

The Group View option takes you to a window that displays all your current groups. You can then add, remove or edit the groups. (For detailed information on setting up and/or changing your groups, go to 'Groups/Columns Setup' in this manual)



Click on **EDIT** to edit the current highlighted Group View.

Click **ADD** to add a new Group View; after clicking ADD; Enter a name to describe the group, then add the providers\resources you want for this group.

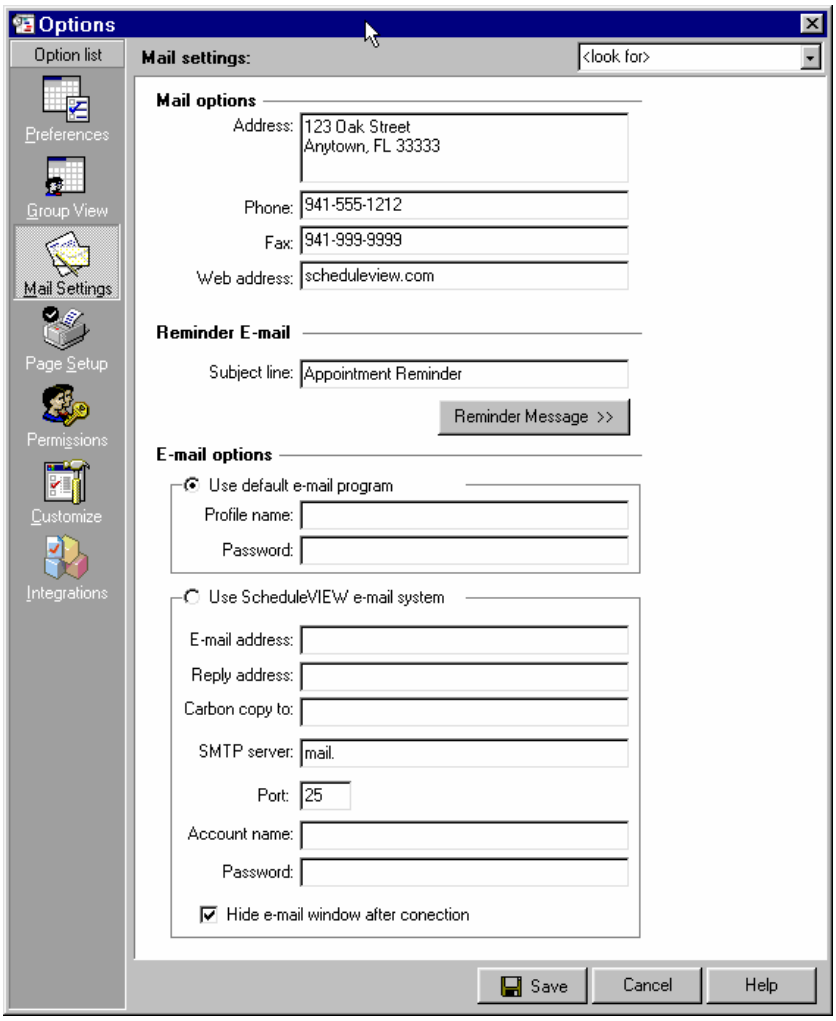
Click **REMOVE** to remove the currently selected or highlighted group.

MAIL SETTINGS – SETTING UP EMAIL WITH ScheduleVIEW™

Setting up an email interface with **ScheduleVIEW™** is easy! Simply select **File** from the **Main Menu**, then **Options** to bring up the Options Window. Select Mail Settings. Scroll down to E-mail Options to set up email. We STRONLY recommend you choose the "Default Email Program" option. If you choose this option, ScheduleVIEW™ will use the default email program that you have setup on your computer.

****1. Your email account must be a SMTP Server, and a POP3 account (Note: AOL is not compatible)

****2. Some ISP's place restrictions on sending email through their servers, or do not allow 3rd party programs to send email through them. You will need to check with your ISP to see if these limitations apply to your account.



Enter the following information to "Use Default Email Program":

E-Mail Options
Use default e-mail program
Profile Name <Enter your profile name here>
Password <Enter your password here>

Use ScheduleVIEW™'s Email System

E-mail address: enter your email address (example: support@scheduleview.com)– [Note: This needs to be a Pop3 account to work with **ScheduleVIEW™; We do not work with FREE type accounts from Hotmail; Yahoo; etc…**

Reply to address: enter the address you want replies to go to

Carbon Copy: enter an email address that you want a copy of all outgoing emails to go to

Email Server: enter the SMTP server name (for example for Earthlink customers it would be mail.earthlink.net); ask your ISP, webmaster, or network administrator if you have any questions

Port: leave at 25 unless your ISP or webmaster or network administrator informs you differently (if 25 does not work, try 2525 as some ISP's are being much more strict in allowing you to send email thru their ports).

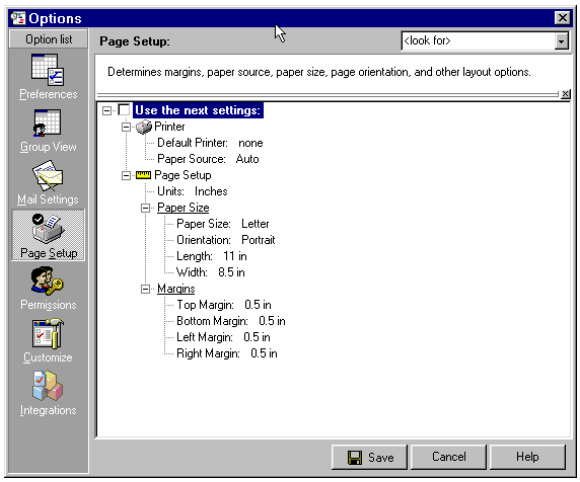
Account name: enter the account name for your email account

Password: enter the password for your email account.

Hide Email Window After Connection: If left unchecked, this will show an email status window.

PAGE SETUP – PRINT OPTIONS

Selecting Page Setup from the Options toolbar allow you to set up printers and to change various print and page layout option in **ScheduleVIEW™**. Just click on each attribute to change or add print options. This is very useful for International customers that may use different page settings than we do in North America. We default the settings for 8 1/2 by 11" paper size.

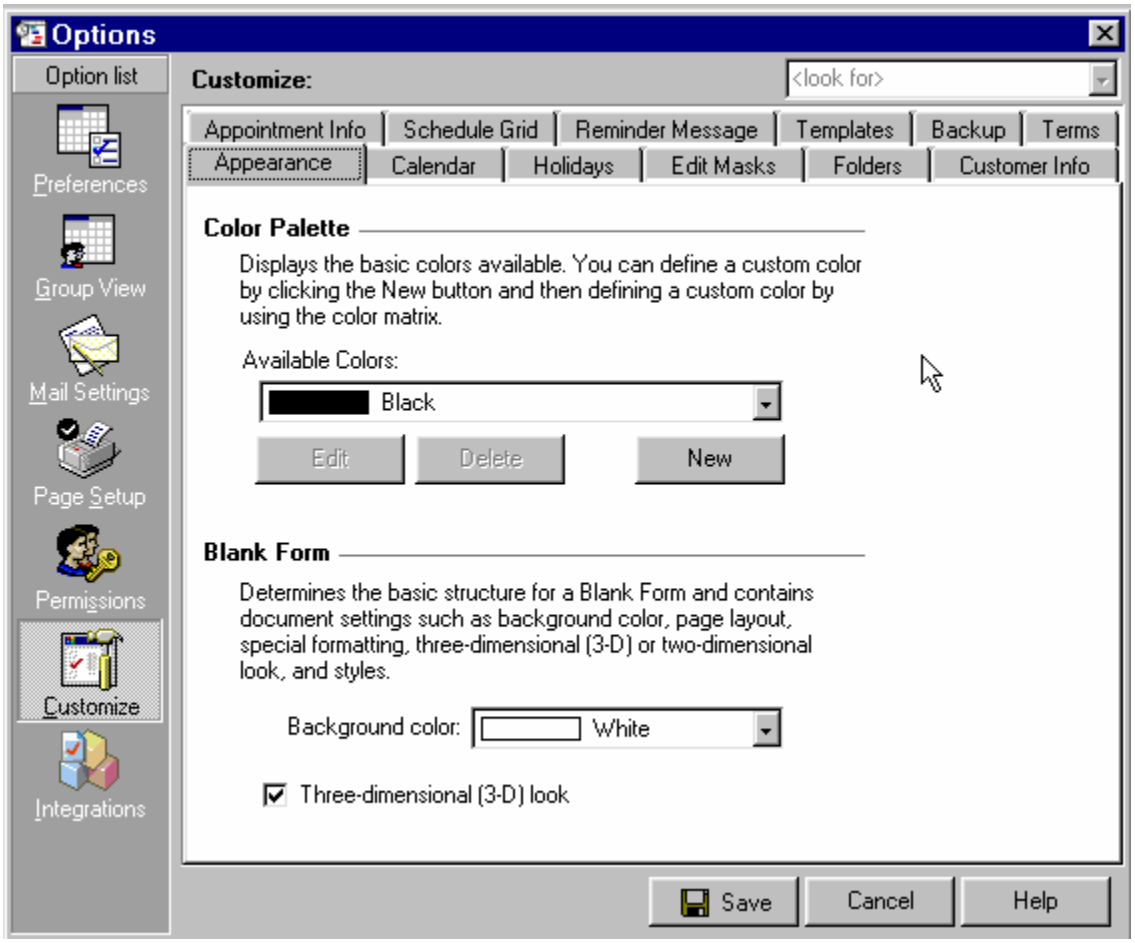


CHANGING APPEARANCES IN ScheduleVIEW™

ScheduleVIEW™ has a great deal of flexibility in its appearance. The following sections will show you how to change the appearance of **ScheduleVIEW™**, the colors, the layout of pages, and even the terminology, to suit the needs of your business. Click on the **Customize** button on the **Options Toolbar** and you will be presented with a window that has 12 folder tabs. The following sections describe each of the 12 folder tabs in detail. Please remember press the **Save** button!

APPEARANCE

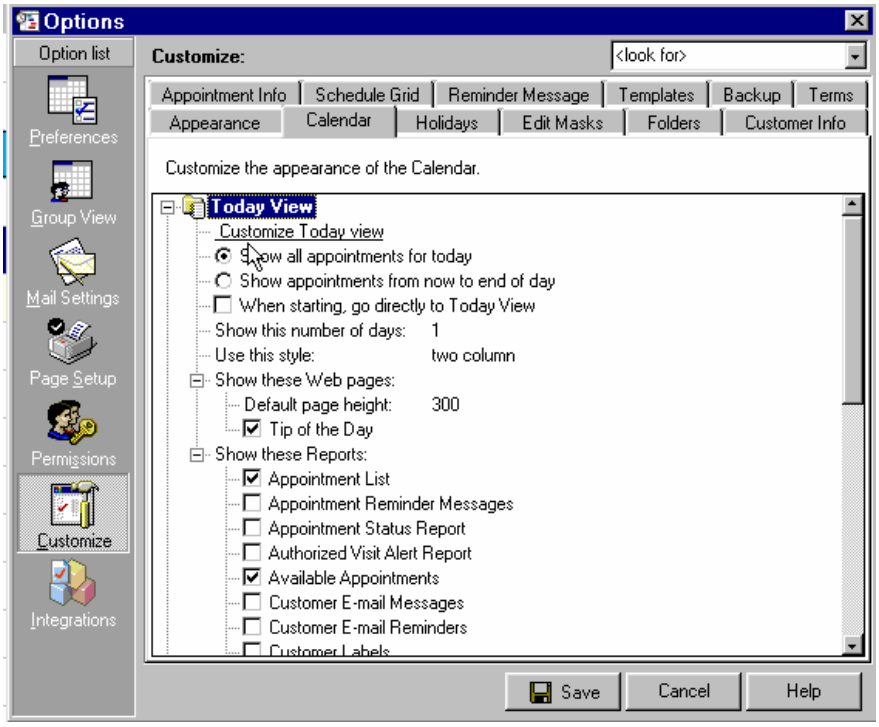
The **Appearance** options sets the overall look your **ScheduleVIEW™** system, including basic color palette, background color for entry forms, and whether or there is a 3-dimensional depth feeling to the forms.



CALENDAR: CUSTOMIZING ScheduleVIEW™

Changing the Calendar Options will have a huge effect on your **ScheduleVIEW™** experience.

Click on the + sign for Today and customize your Today page, including such things as: how appointments are shown, what tips and web pages to display, and which frequently used reports to list. 'Today View' under the 'Calendar' tab allows you to customize the look of the 'Today View' which appears when you click on the 'Home' button at the bottom of the ScheduleVIEW™ window.



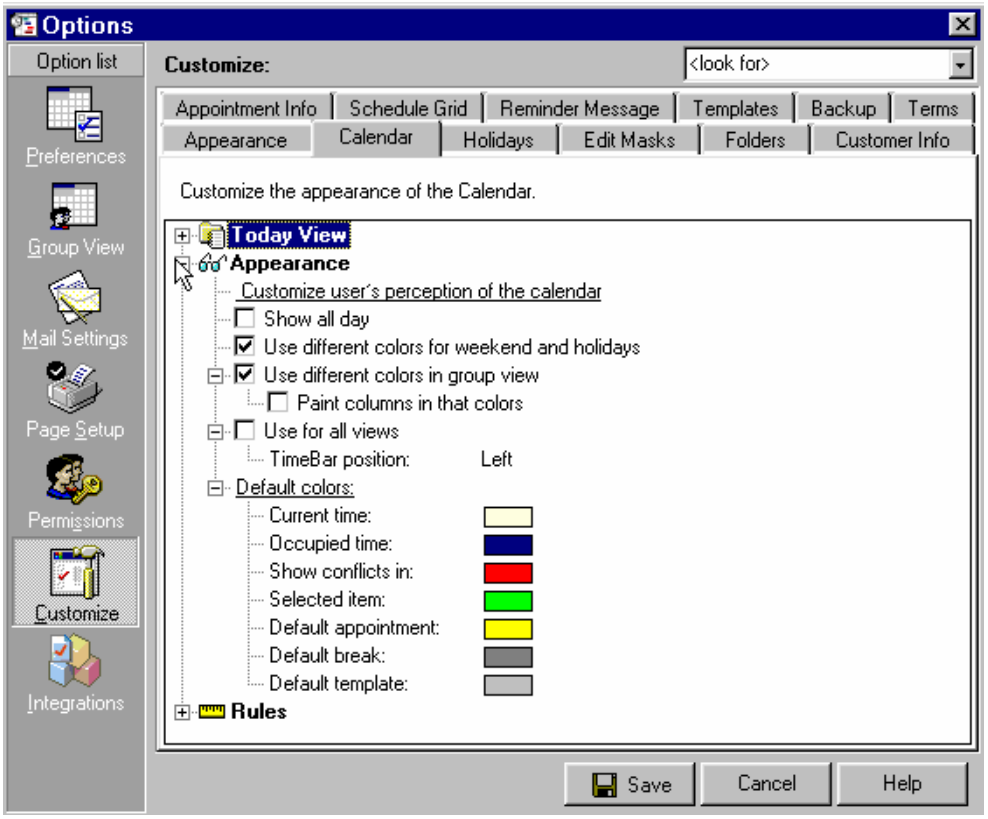
'When starting go directly to Today View' allows you to jump directly to the today view when ScheduleVIEW™ first loads.

'Show this number of days' allows you to control the daily appointments displayed in the 'Today View'.

'Show these Web pages' allows you to insert custom information or useful web pages directly into the 'Today View'. You may insert edit or remove these websites. 'Tip of the Day' is inserted by default.

'Show these Reports' allows you to create shortcuts to your favorite reports on the 'Today View'. Links to check-marked reports will display under the 'Reports' section of the 'Today View'

Click on the + Sign for **Appearances** and customize your Calendar Views, including such things as colors, time bar position, and all day or work day views.



'Appearance' under the 'Calendar' tab allows you to change the way the schedule grid displays.

When check-marked the 'Show all day' option displays time slots outside of the work day. These timeslots are shaded gray, but you still schedule them by double-clicking.

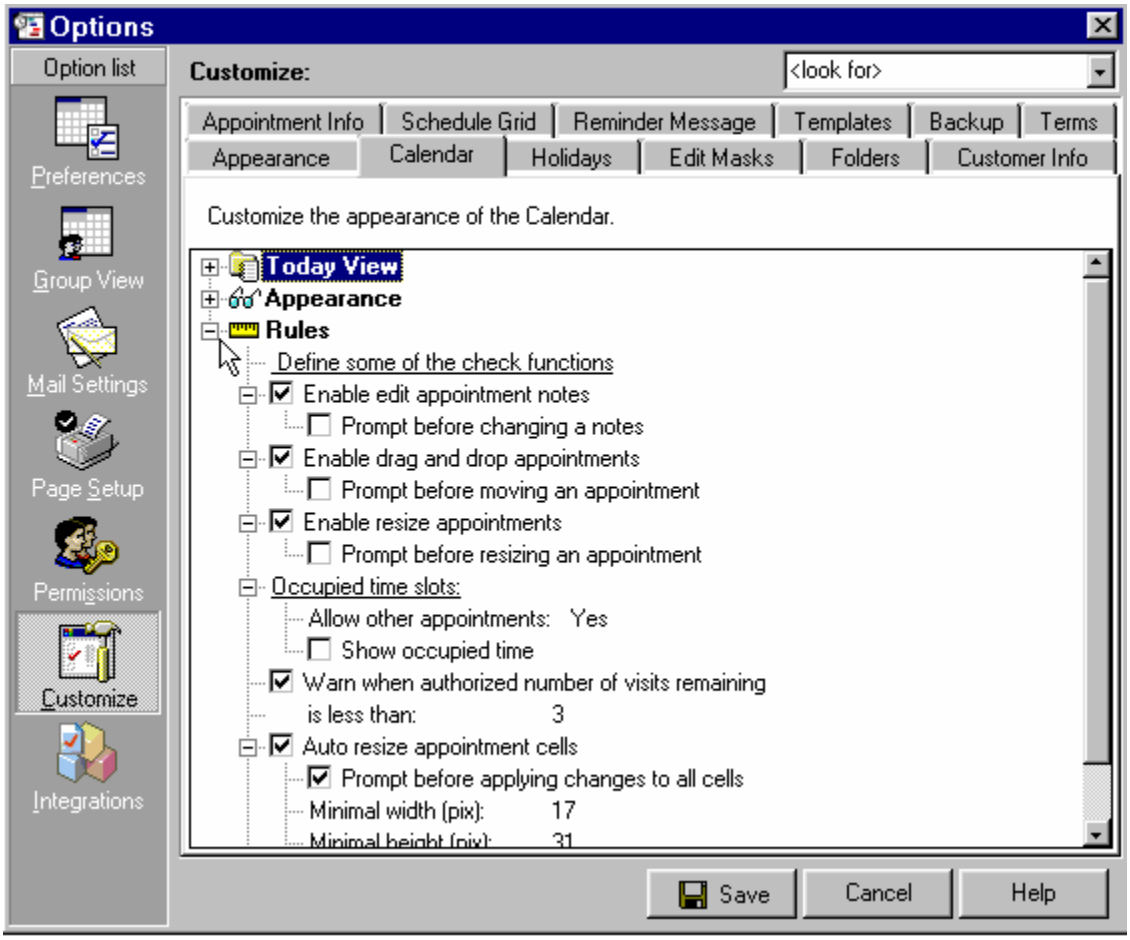
'Use different colors for weekends and holidays' control the display for marked holidays and weekends. You may change these colors in 'File > Options > Preferences' under the 'Calendar' section.

'Use different colors in group view' allows you to use custom colors for each provider/resource in the group view. 'Paint columns in that color' allows you to change the entire column to the color selected for the provider/resource.

'Use for all views' makes your changes applicable to all of the schedule grid views in ScheduleVIEW™. 'TimeBar position' allows you to control the location of the TimeBar which labels the time intervals.

'Default Colors' allows you to modify the display color for each specific type of item that appears on the schedule grid.

Click on the + Sign for **Rules** and set up general rules for **prompts, warnings, and drag and drop options.**



'Rules' under the 'Calendar' tab allows you to specify the way in which ScheduleVIEW™ handles information on the schedule grid.

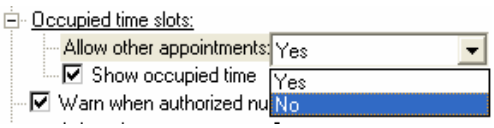
'Enable edit appointment notes' allows you to change the appointment notes from the schedule grid. You may check-mark 'Prompt before changing notes' if you would like to be warned before editing.

'Enable drag and drop appointments' allows you drag appointments from one timeslot to another. You may check-mark 'Prompt before moving and appointment' to be prompted before changes are made to the schedule.

'Enable drag resize appointments' allows you to drag the edge of an appointment to cover more time. You may check-mark 'Prompt before resizing an appointment' to be prompted before changes are made to the schedule.

POP-UP MESSAGE: ATTEMPTING TO DOUBLE-BOOK

'Occupied time slots' allows you to modify the way in which ScheduleVIEW™ schedules multiple appointments, allowing you to schedule multiple appointments for the same time slot, or double-book and triple-book.



Click on 'Allow other appointments' to choose your option. If marked 'no' you will be prompted with a pop-up message (which you may override) if you attempt to double-book. **This does not prevent double-booking.**

(If you wish to disable double-booking entirely, go to the 'Permissions, setting up security' section in this manual)

'Show occupied time' highlights occupied time on the TimeBar.

'Warn when authorized number of visits remaining' allows you to set a warning level for the authorized visits left, set in each customer's information form.

'Auto resize appointment cells' allows you to control the automatic resizing of the columns in ScheduleVIEW™. You may allow ScheduleVIEW™ to automatically handle the size or uncheck this box to specify your own by dragging the column borders on the schedule grid. If you have this box checked you may also specify the minimum cell. You may check-mark 'Prompt before applying changes to all cells' to be prompted before changes are made to the schedule if you wish to be warned when changing the size of the columns yourself.

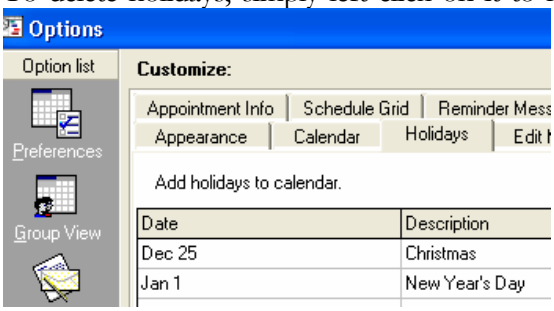
'Warn when scheduling a non-default provider' allows you to disable the warning when you attempt to schedule a customer with a provider other than the one specified for that customer in the customer database.

HOLIDAYS

Select **Holidays** from the tab and enter all the holidays for your business. Double click on a blank space to add. Select a current holiday and double-click to edit. Highlight and press the **Delete** key to delete.

When adding a holiday, double-click to setup an annual recurrence so that **ScheduleVIEW™** automatically creates the holiday dates for years to come.

To delete holidays, simply left click on it to highlight, and press the 'Delete' button on your keyboard.



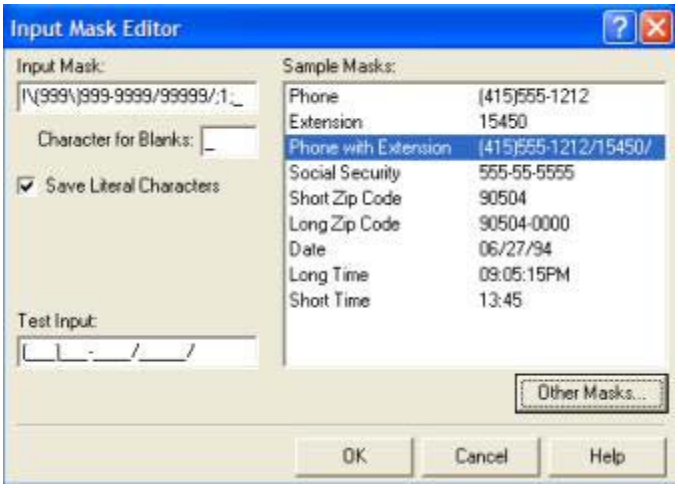
CUSTOMIZING DATE, PHONE, AND ZIP CODES – EDIT MASKS

ScheduleVIEW™ allows you to customize your date, phone, and zip code edit formats to suit your business needs. This means that you can ensure your staff uses one consistent manner of entering in this vital information.

Date formats:

Choose the Short and Long date formats that you would like to use throughout ScheduleVIEW™. Most North American users will not need to change the default settings. 'Date formats' under the 'Edit Masks' tab allows you to change the format for both the long and short date formats. 'Use system settings' forces ScheduleVIEW™ to use the default Windows™ setting from your computer. 'Use these settings' allows you to specify the formats. 'Short date' specifies the format for abbreviated dates, i.e. 10/12/03. 'Long date' specifies the format for the full date, i.e. Thursday, January 1, 2003. You may select these formats from a dropdown list of available styles.

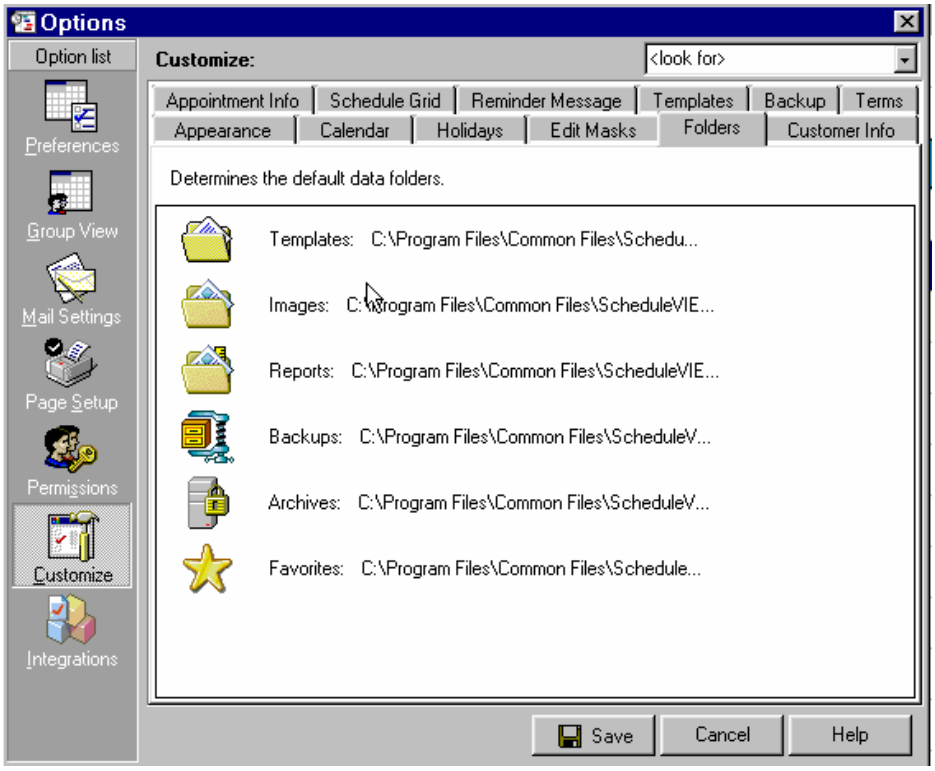
Click EDIT MASKS to make changes to the Phone number and Zip Codes fields in ScheduleVIEW™



The default is setup for the United States; if you reside in a country other than USA, you will need to make changes to either the p hone number or zip code section. To do this, simply click on OTHER MASKS, then select your appropriate country and this information will be filled in automatically. All of **ScheduleVIEW™**'s forms will be updated instantly to ensure you have consistent data entry. Be sure to click **Ok** and then **Save** to save your **Edit Masks.**

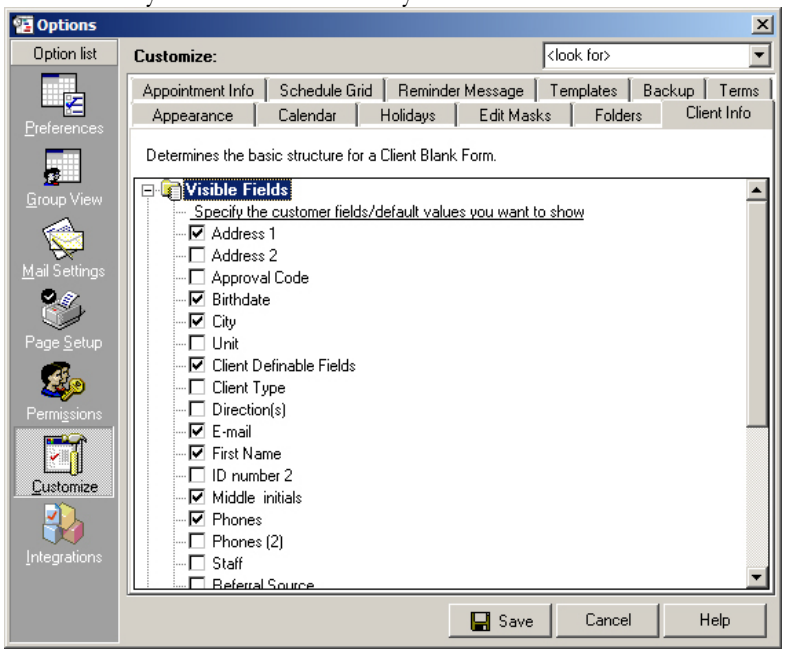
FOLDERS

Determine where on your computer your data is being stored by clicking on the Folders tab. The 'Folders' tab allows you to edit the locations in which ScheduleVIEW™ stores information. You may specify each location by clicking on the type and then clicking on the three dots to the right of the current path.

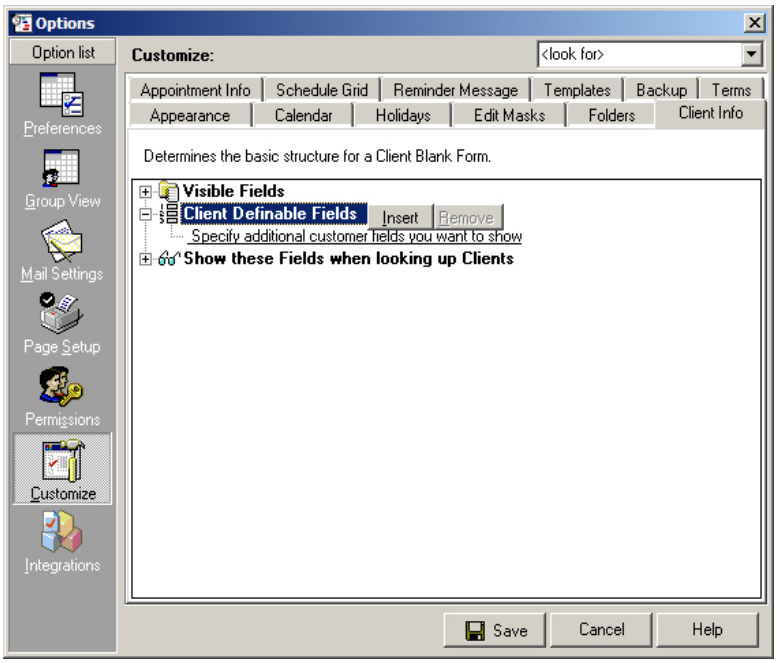


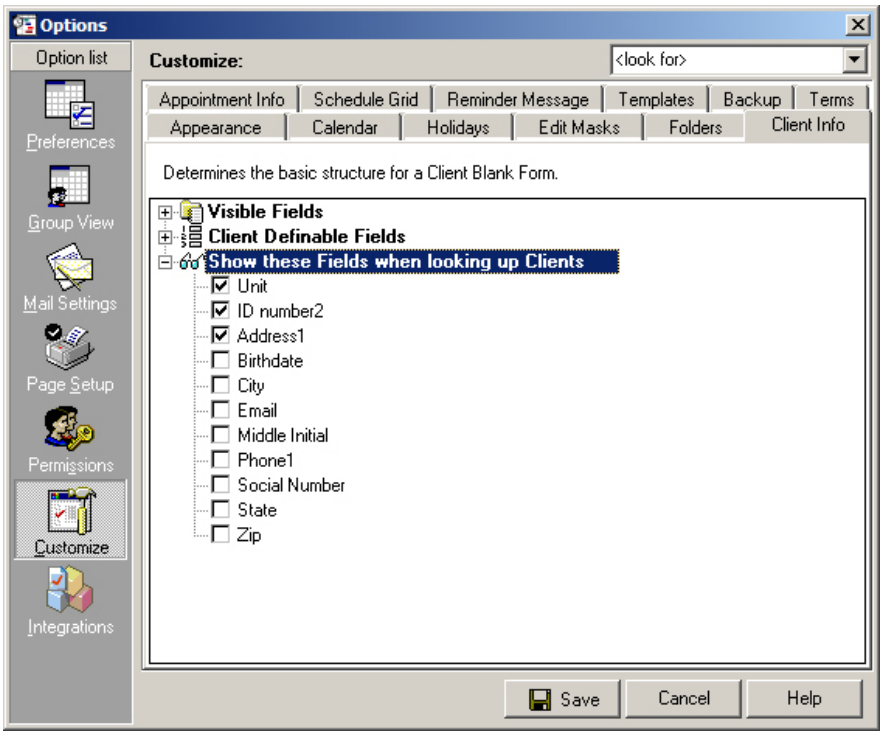
CUSTOMER INFO – COLLECTED AND SHOWN YOUR WAY

Your customer information is the most valuable part of your business. Define which fields of information you wish to enter for your customers and the default values for these fields by clicking on the + sign for **Visible Fields** and **Default Fields**. Visible fields are those fields that you want to show on the ADD\EDIT customer Screen.



Add your own field definitions by clicking on the + sign for **User-defined fields**. 'Customer Definable Fields' under the 'Customer Info' tab allows you to create custom fields which are stored in the customer database. You may create, name, and sort these fields from this window. These fields display in the new customer forms as well as forms for customers previously entered.

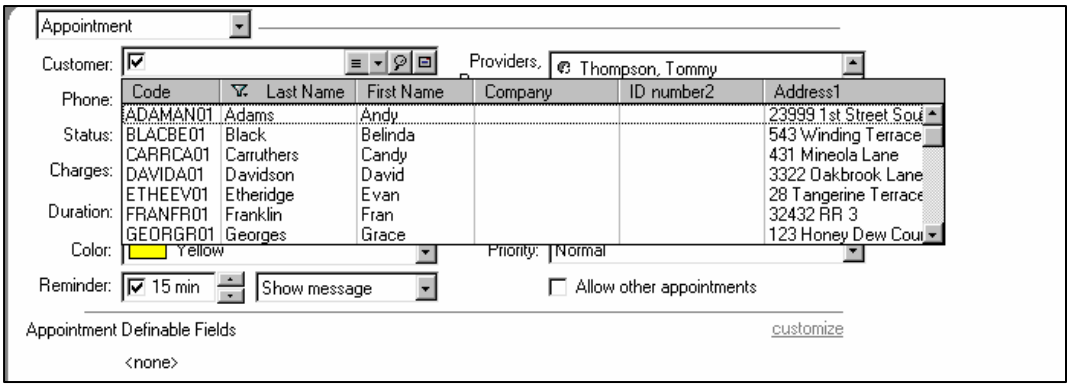




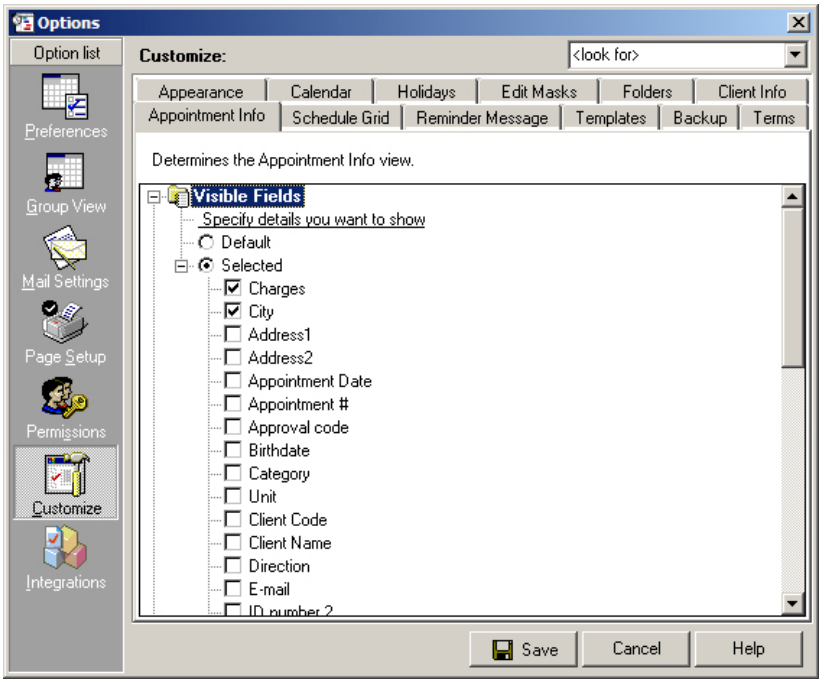
And, click on the + for **Show these fields when looking up Customers**, to define your short-list of critical customer information to show on the drop down list when selecting customers; for example you can add the birthday or other fields to help distinguish between customers.

'Show these Fields when looking up Clients' under the 'Client Info' tab allows you to modify the fields that display when you are searching for a customer. Check-marked fields are displayed during a search in the drop down box, here is what it looks like:

In this example, we are showing the CODE; LAST NAME: FIRST NAME: COMPANY; ID#2: and ADDRESS 1.

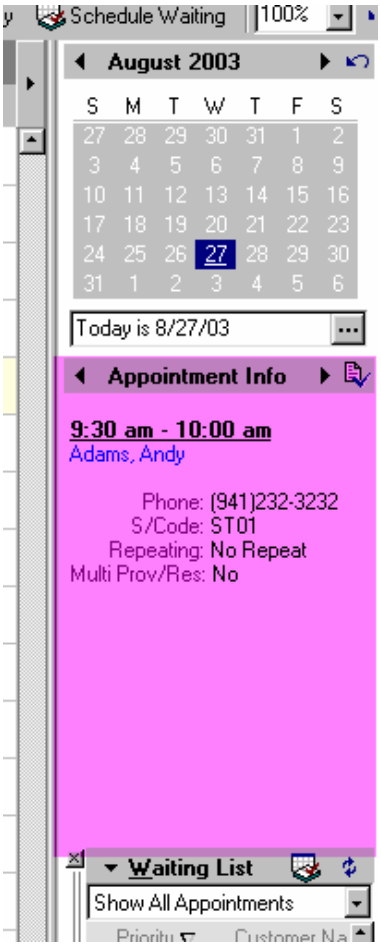


APPOINTMENT INFORMATION



Select exactly which information you wish to see for appointments in the Appointment Info window by clicking the + sign on Selected here and select the fields you want displayed.

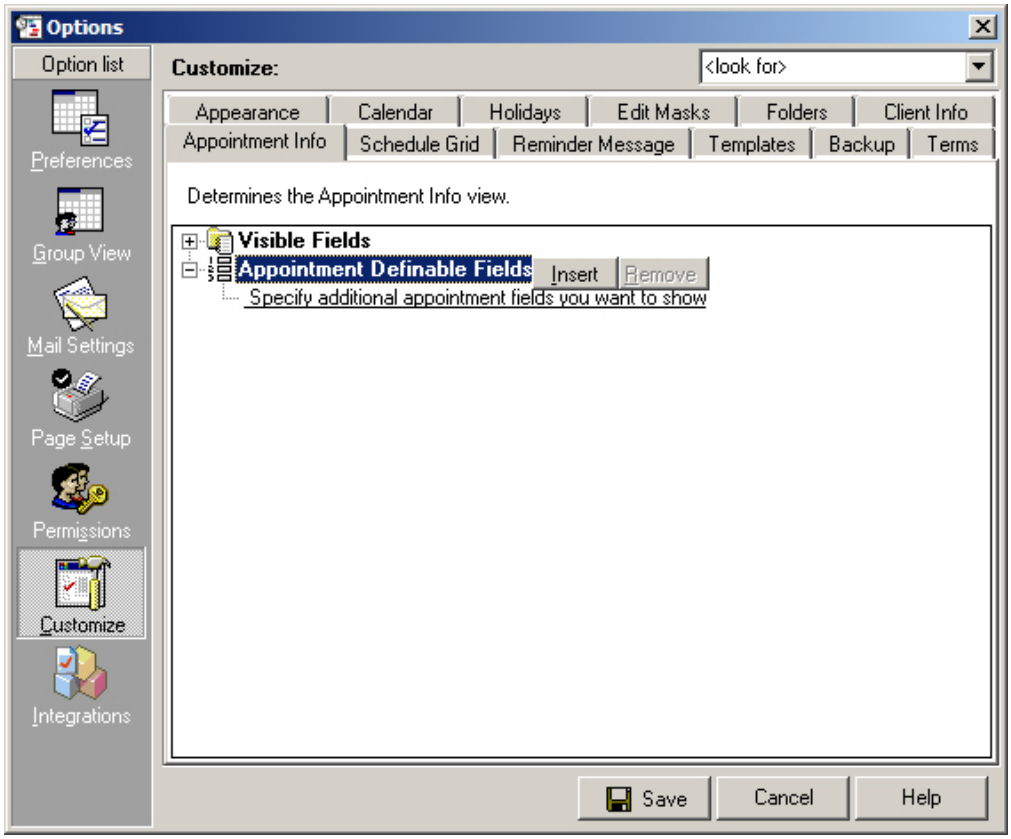
The Appointment Info window is shown below; it is located on the main schedule screen when you open the program, on the right hand side of the screen.


Schedule Waiting
100%
August 2003
S M T W T F S
27 28 29 30 31 1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
31 1 2 3 4 5 6
Today is 8/27/03
Appointment Info
9:30 am - 10:00 am
Adams, Andy
Phone: (941)232-3232
S/Code: ST01
Repeating: No Repeat
Multi Prov/Res: No
Waiting List
Show All Appointments

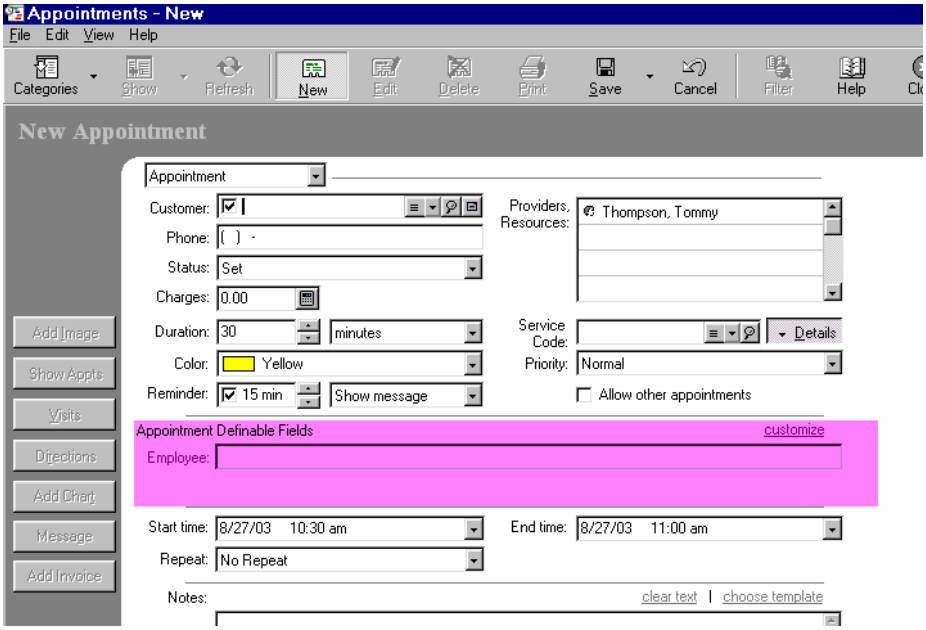
APPOINTMENT DEFINABLE FIELDS:

You may also insert customizable fields in the ADD\EDIT Appointment window when you create or edit a new appointment, these are called Appointment Definable Fields. The information is stored only with that particular appointment and is useful in storing specific information about this appointment. Some users have asked us if they can track which employee made or changed an appointment-- this is one way to do that. Just add a field called "Employee" and then your staff can enter their initials or name here. You can also filter some reports based on the contents of the field. The fields are TEXT only, so if someone types in Robert then other times Bob, and you filter on ROBERT, you won't get the appointments that contain BOB.

To add a field, click on the INSERT button, then type in a name for the field name.



Here is what the ADD\EDIT Appointment Screen looks like with the new Appointment Definable Field called EMPLOYEE:

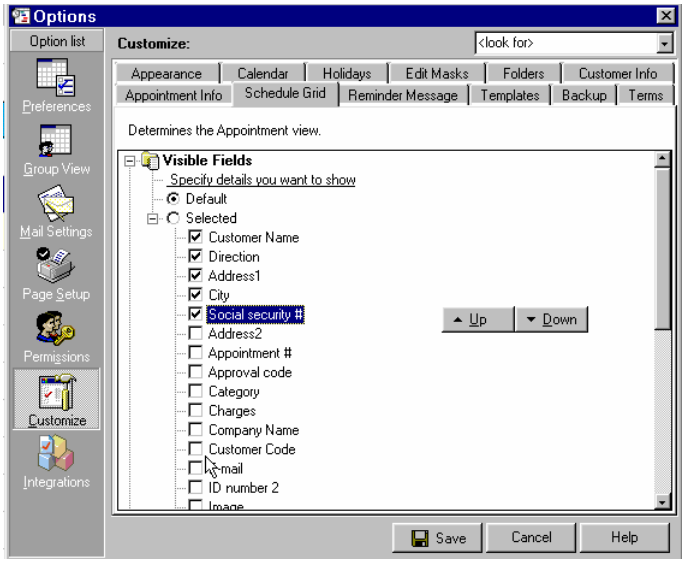


SCHEDULE GRID

The Schedule Grid gives you details of a specific appointment right on the main scheduling screen of the program, in the appointment cells themselves.

Customize how you wish to see the Schedule Grid information in the Calendar View by selecting and deselecting information here including appointment notes, customer notes, directions, customer chart, customer pictures.

IMPORTANT!!! The amount of information that will get displayed on the screen is determined by what you select here AND HOW LONG THE APPOINTMENT IS . In other words, if your time increment is 15 minutes for each cell, and you select 4 items to display here, AND the appointment is only 15 minutes, only the first field will show. To get more information to show, you would need to make the appointments longer, or make the time increment smaller, or drag the appointment cells wider and/or longer. (IF you are unable to drag them, you can change change your options in 'File' 'Options' 'Calendar' 'Rules' 'Enable Resize Appts') IMPORTANT!!!!

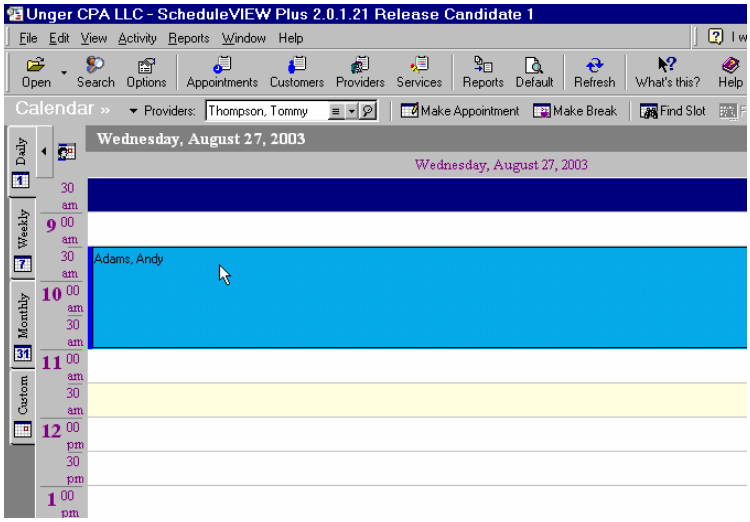


VISIBLE FIELDS:

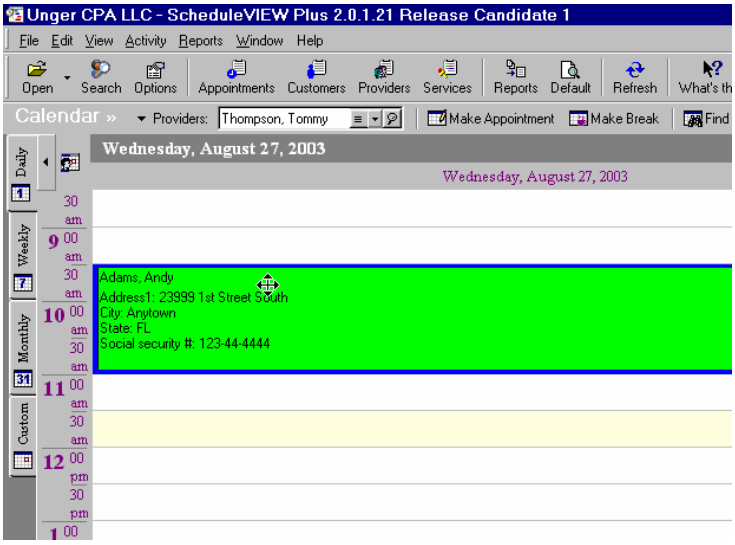
'Visible Fields' allows you to view specific information on your Schedule.

Click on 'Visible Fields' then 'Selected' and choose which fields you desire to see on your Schedule Grid.

What effect does this have on my screen?


Unger CPA LLC - ScheduleVIEW Plus 2.0.1.21 Release Candidate 1
File Edit View Activity Reports Window Help
Open Search Options Appointments Customers Providers Services Reports Default Refresh What's this? Help
Calendar » Providers: Thompson, Tommy Make Appointment Make Break Find Slot
Daily Weekly Monthly Custom
Wednesday, August 27, 2003
Wednesday, August 27, 2003
Adams, Andy

Here is a BEFORE screen shot of what the Schedule Grid looks like in a default format, without customizing:


Unger CPA LLC - ScheduleVIEW Plus 2.0.1.21 Release Candidate 1
File Edit View Activity Reports Window Help
Open Search Options Appointments Customers Providers Services Reports Default Refresh
Calendar » Providers: Thompson, Tommy Make Appointment Make Break
Daily Weekly Monthly Custom
Wednesday, August 27, 2003
Wednesday, August 27, 2003
Adams, Andy
Address1: 23999 1st Street South
City: Anytown
State: FL
Social security #: 123-44-4444

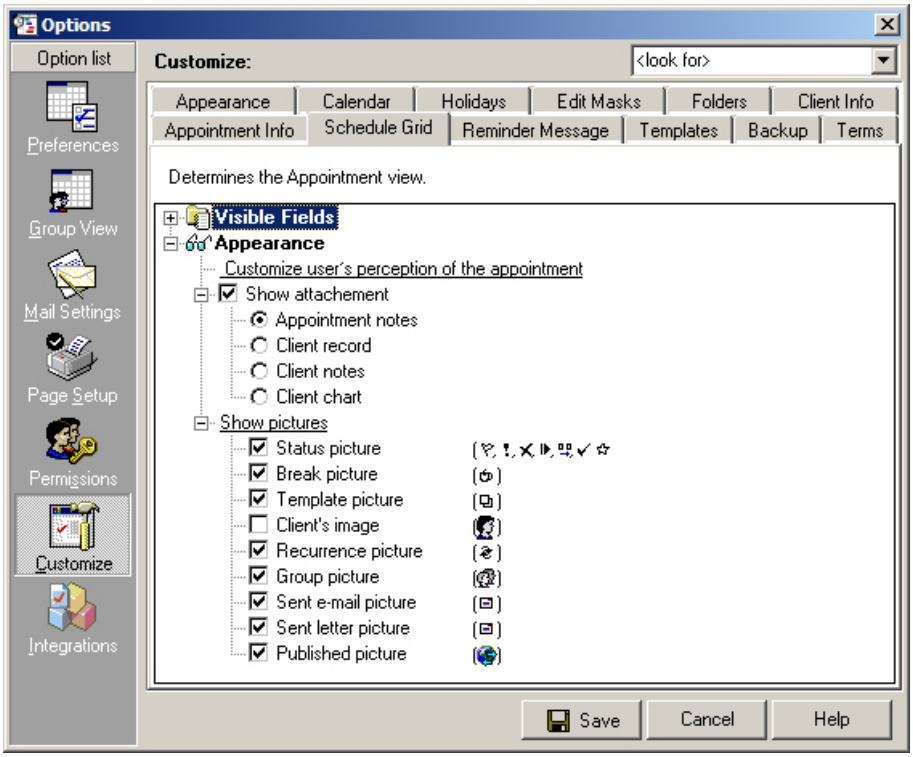
And here is the same screen AFTER we customized it to show the Customer Name; Adress1; City; State and Social Security Number.

APPEARANCE:

'**Appearance'** under the 'Schedule Grid' tab allows you to customize the way appointments display on the schedule grid.

'Show attachment' allows you to select which information is shown as an attachment to the appointment. The information you select will display when you click on the paper clip in upper right hand corner of the appointment.

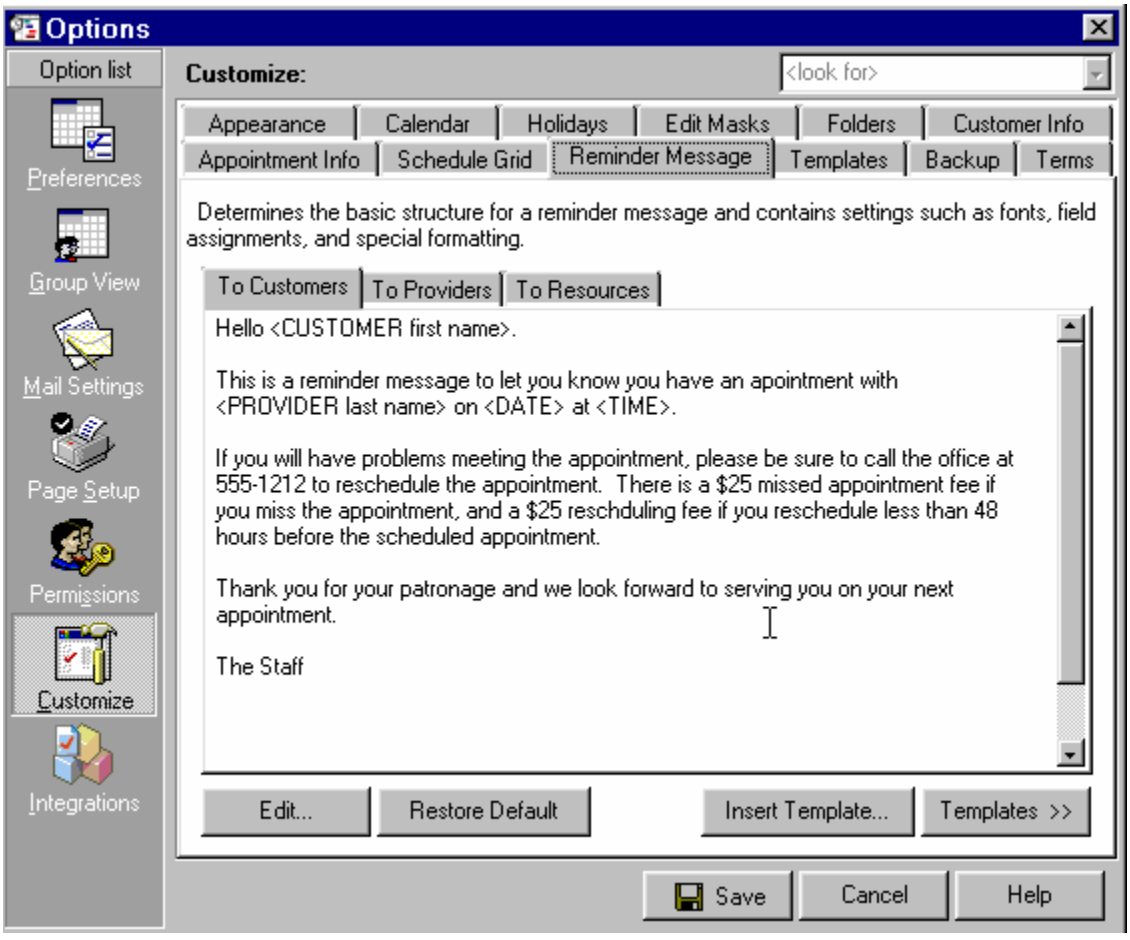
'Show pictures' allows you to choose which information has a pictorial representation on the appointment block. If information of that type is present, the picture will appear in the upper right hand corner of the appointment block..



REMINDER MESSAGE

Reminder messages can also be used for Work Orders; Superbills; Routing slips; Encounter forms; etc. Basically you are creating a "Document" and merging that document with specific information about the customer and or appointment. For more detailed information on how to create a Reminder Message, visit our website at: http://www.scheduleview.com and click on the "Quick Tour" navigational button at the time and look for the Reminder Message topic link on that page.

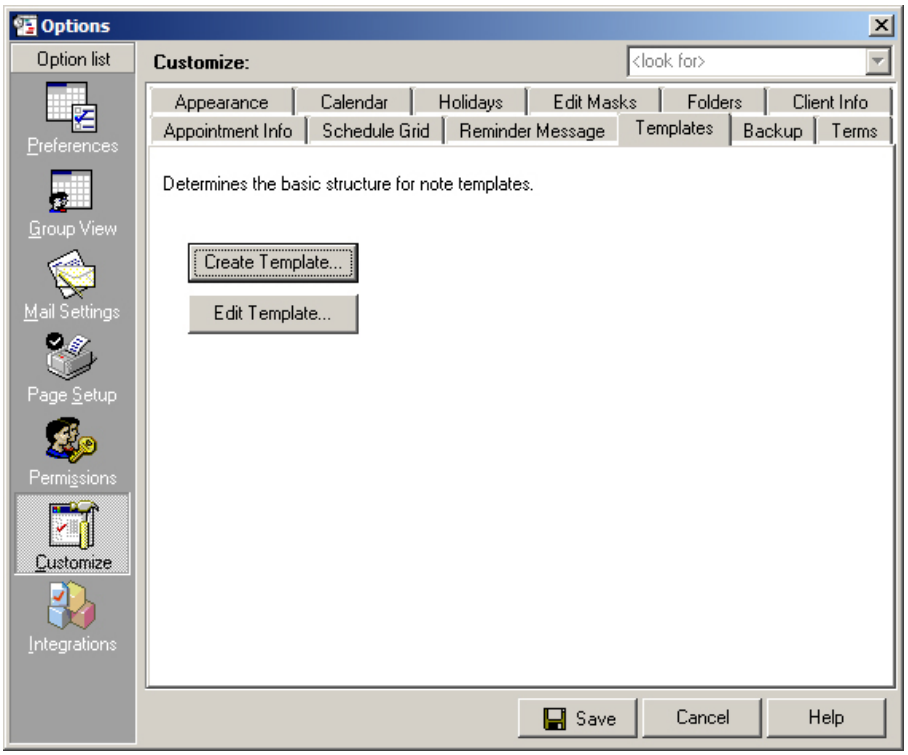
The 'Reminder Message' tab allows you to set default templates for reminder messages automatically generated by ScheduleVIEW™. You may edit an existing template by pressing 'Edit…', restore the default template by pressing 'Restore Default', insert an already created template by pressing 'Insert Template', or jump to the 'Templates' tab to create a new template. You may specify templates here for customers, providers, and resources.


Options
Option list
Customize:
<look for>
Preferences
Group View
Mail Settings
Page Setup
Permissions
Customize
Integrations
Appearance
Calendar
Holidays
Edit Masks
Folders
Customer Info
Appointment Info
Schedule Grid
Reminder Message
Templates
Backup
Terms
Determines the basic structure for a reminder message and contains settings such as fonts, field assignments, and special formatting.
To Customers
To Providers
To Resources
Hello <CUSTOMER first name>.
This is a reminder message to let you know you have an apointment with <PROVIDER last name> on <DATE> at <TIME>.
If you will have problems meeting the appointment, please be sure to call the office at 555-1212 to reschedule the appointment. There is a $25 missed appointment fee if you miss the appointment, and a $25 reschduling fee if you reschedule less than 48 hours before the scheduled appointment.
Thank you for your patronage and we look forward to serving you on your next appointment.
The Staff
Edit...
Restore Default
Insert Template...
Templates >>
Save
Cancel
Help

FOR COMPLETE INSTRUCTIONS: SEE 'LEAD SHEETS, SUPERBILLS, ENCOUNTER FORMS, WORKORDERS, ETC' IN THIS MANUAL

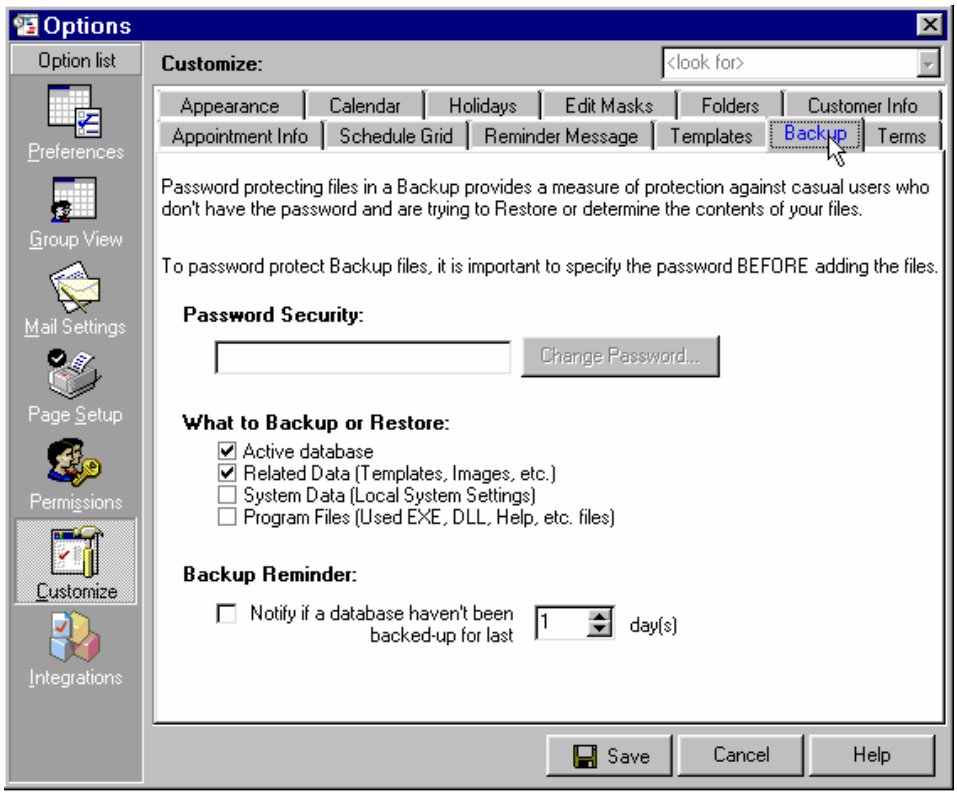
Templates

From the 'Templates' tab you may create new or edit already existing templates. In the template editor you may insert fields from ScheduleVIEW™, both the customer database and the provider database. Click 'Create Template…' to launch the template editor with a blank file, or 'Edit Template…' to browse for an existing file. In the top right hand corner of the template editor you may click on the 'Fields' button to insert a ScheduleVIEW™ field from a list of those available.



Backup

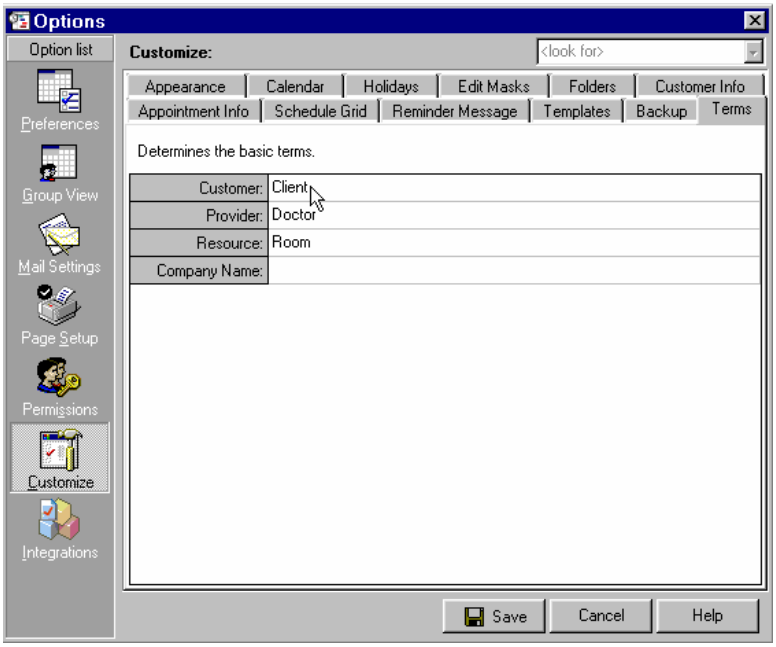
Set your defaults for the Database Backup process here by setting passwords, determining what files to include in Backup's and Restores, and setting an automatic reminder to backup your database. From the 'Backup' tab you may change the settings related to your ScheduleVIEW™ system backup.
'Password Security' allows you to set a password to restrict access to the .zip file created by the backup process.
'What to Backup or Restore' allows you to control the amount and type of information included in the backup and restore process.
'Backup Reminder' allows you to set the occurrence and frequency of a backup reminder message.



TERMS - CHANGING TITLES: Company, Customer, Provider and Resource

ScheduleVIEW™ Plus includes a new option that allows you to change basic terms to fit your business. Change Customer to Patient, Student, or Homeowner. Change Provider to Doctor, Instructor, Agent or Technician. Change Resource to Room, Truck, or Laptop. Or Company Name to Unit Number - You decide! ******IMPORTANT NOTE**** The field here that we call "Company Name" is the field name called "Company name" in the customer database screen-- IT IS NOT YOUR COMPANY NAME.** Most users should not change this: exceptions might be military bases that want to change Company name to "Unit"; or if perhaps your customers purchase something from you with a "serial number" and you want to track it here.

To get to the 'Terms' click on 'File' 'Options' 'Customize' 'Terms'



From the 'Terms' tab you may specify the terms used to refer to customers, providers, and resources. (Be aware that once saved, these terms are used throughout the program to refer to their designated counterparts. If you see names referred to differently than in the manual or tutorials, it may be because you have specified a different term from within your software.)

SECURITY\PERMISSIONS:

SETTING UP SECURITY FOR ScheduleVIEW™

Determining who has access and can update your business' data is an important decision. **ScheduleVIEW™** allows you to setup passwords and gives you the options of establishing different security levels based on your business' need for secure information. **ScheduleVIEW™** comes with a built-in *Administrator* user that has access to all of **ScheduleVIEW™**'s functions and databases. All other users must be added.

Security for **ScheduleVIEW™** is on 3 levels:

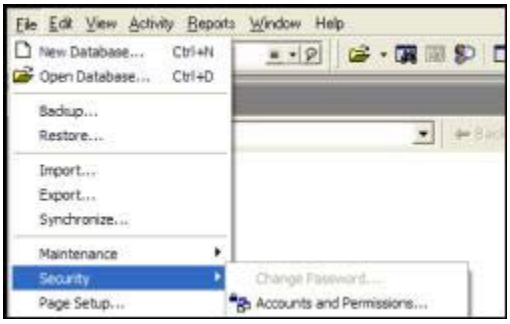
Application: Determine whether a user id and password is necessary to open **ScheduleVIEW™**

Group: Set up the permissions and securities for an entire group of users.

User: Set up individual security levels and permissions for specific users.

ScheduleVIEW™ comes with four pre-determined groups of users. But we don't stop there! **ScheduleVIEW™** allows you to create your own groups, assigning security the way your business is organized.

Administrators, who have complete and unrestricted access to **ScheduleVIEW™** and the **ScheduleVIEW™**'s database.



1. **Guests**, who have restricted access to **ScheduleVIEW™** and the **ScheduleVIEW™** database. This is used for people with view-only access to appointment information.

2. **Users**, who have limited ability to change data in the **ScheduleVIEW™** database.

3. **PowerUsers**, who have some administrative power but with restrictions.

To access the security area of **ScheduleVIEW™,** Select **File** from the main menu, then **Security** to bring up the security sub-menu. Finally select **Accounts and Permissions.** This brings up the **Accounts and Permissions Options window**, where you can establish security for the overall system, for groups, and for individual users.

LIMITING ACCESS TO SCHEDULEVIEW™

Options
Option list
Accounts and Permissions:
<look for>
Users must enter a name and password to use this database.
Preferences
Click to select the check box next to any action that you want to have access.
Administrators
Guests
Administrators have complete and unrestricted access to the computer/database

To require a login for **ScheduleVIEW™**, check the box **☑ Users must enter a name and password to use this program**.

This ensures that users must login to **ScheduleVIEW™** with a user id and password when starting the program and ensures that no one can have unauthorized access to your customer database and appointment information.

SETTING UP NEW GROUPS AND USERS IN SECURITY WITH THE ACCOUNTS AND PERMISSIONS WIZARD

The Left Pane of the **Accounts and Permissions Option Window** lists groups of **ScheduleVIEW™** Users. Click on the + to expand each group and show individual users.

To add a new user, click on the Add button on the bottom of the window.

This initiates the **Accounts and Permissions Wizard** which guides you through the set up of new **ScheduleVIEW™** Users and Security Groups.

Accounts and Permissions Wizard
What would you like to do?
Users and Groups can limit the ability to perform certain actions by assigning them rights and permissions.
Create a security Group account
As part of securing a database, you can create group accounts that you use to assign a common set of permissions to multiple users. Organizing users in groups makes it easier to manage a secure database.
Create a security User account
This is an account that can be granted permissions and rights, and it regulates which users can have access to the database and in what manner. Only user accounts can log on to Daily Planner database; you can't log on by using a group account.
To continue, click Next.

Select Group or User to begin with.

Remember, creating a security Group account sets permissions for multiple users.

Selecting a security User account gives access to an individual. Only individuals can access the Daily Planner Database.

Select a group that this user belongs to.

Enter a name, password, full name and description for the user you are adding. **Be sure to click on the three periods next to password ... to select a secret question in case you forget the password.**

Choose any of the checkbox options at the bottom of the window.

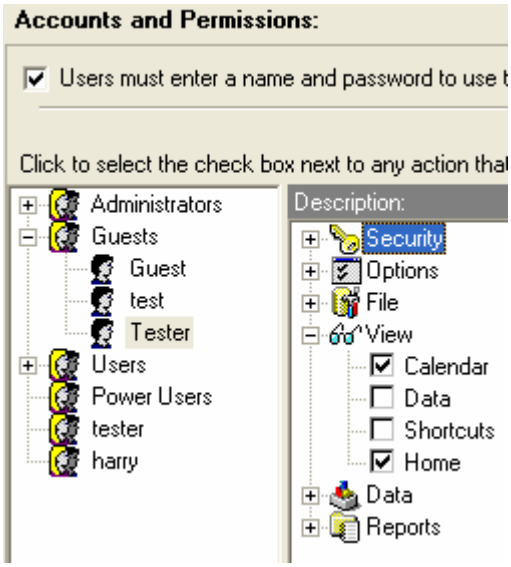
Click on the "Finish" button in order to save this user. A Popup Window will ask you if you wish to set a security question for forgotten passwords for this user. Click Ok and then Finish to save the user.

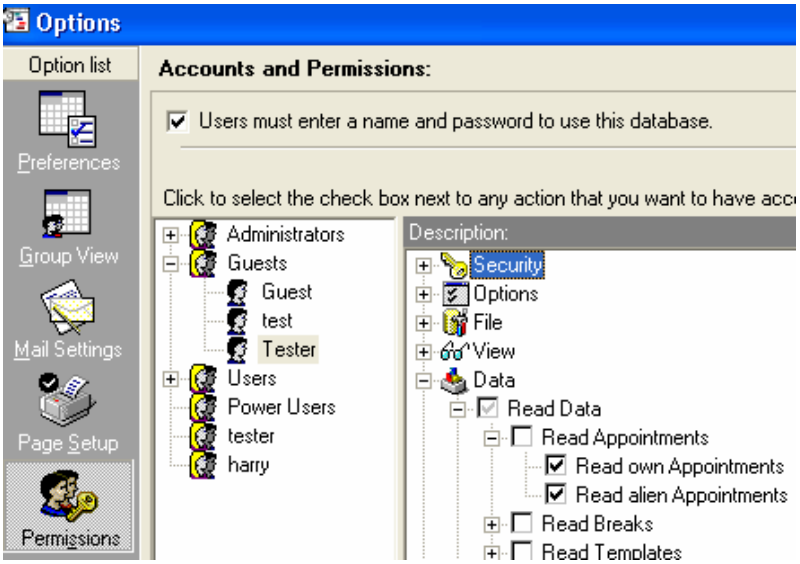
This takes you back to the previous **Accounts and Permissions** window.

Click on the **+** icon next to each category to choose add or delete security permissions for this user.

VIEW ONLY - GUESTS

Note: If you want a 'Guest' to only be able to view the calendar, and be unable to make any changes: uncheck everything except 'view calendar'.





VIEW ONLY - PROVIDERS

To have a provider only view their own schedule and no one else's. Go through all sections under 'Data', and check 'Read own Appointments' and uncheck 'Read Alien Appointment'

FORGOTTEN PASSWORDS

ScheduleVIEW™ helps with forgotten passwords. Click on Forgot Your Password on the logon window to receive your security hint. HOWEVER, YOU MUST HAVE ENTERED A PASSWORD HINT WHEN YOU CREATED YOUR USER ACCOUNT.

ONCE YOU ENTER THE HINT, YOU WILL BE GIVEN THE PASSWORD AND BE ABLE TO LOGON.

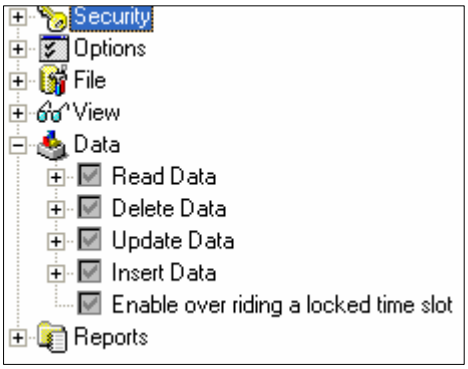
CHANGING PASSWORDS

Good system security requires that Users change their passwords on a regular basis. Users can change their own passwords by selecting **File, Security, Change Password**. This brings up the **Change Password** window. Enters the old password and then the new password twice to confirm. Click on **OK** to save.

System Administrators can change user passwords through the **Accounts and Permissions** Window.

If you are unable to retrieve your password, you may call and for a fee ***ScheduleVIEW™*** *tech support may be able to recover it for you.*

TOTALLY PREVENTING DOUBLE-BOOKING Through security setup.



Use this methond for TOTALLY preventing a user from double booking appointments. By default, ScheduelviewTM only WARNS you of a double booking situation and allows you to double book if you click that its OK to double book. However in some companies or in some situations, you may want to totally prevent someone from double booking. To accomplish that, Select the 'User' you wish to prevent from double-booking: Click on the Plus sign by DATA and Uncheck 'Enable over riding a locked time slot'

If this is set up in security the 'Administrator' can log in and double-book for special circumstances.

(If you would simply like a warning to pop-up which you can override and be able to double-book, go to the 'Double-Booking - Warning Pop-Up Message' section in this manual.)

To create a security Group, choose Group in the **Accounts and Permission Wizard**.

ScheduleVIEW™ allows you to create the new group by importing the security permissions of an existing security Group or to create the new security Group with no security permissions

Click on **Next** to continue. Enter the group Name and Description, Click **Finish** to create the security Group.

This takes you back to the previous **Accounts and Permissions** window.

Click on the **+** icon next to **Security** and then **Options** to choose add or delete security permissions for this user.

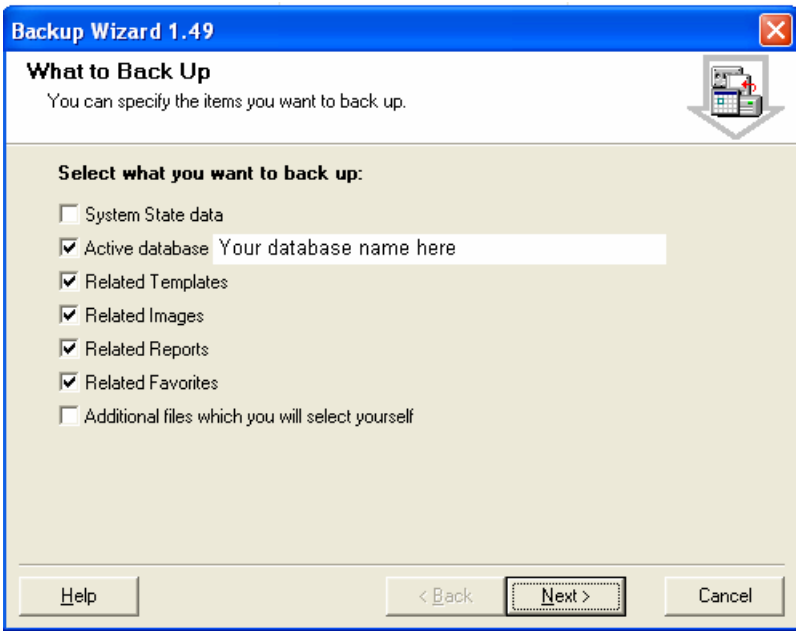
Click on 'Save' at the bottom of the window when you are finished.

MAINTENANCE

BACKUP & RESTORE

Backups of data are critical to any successful business. **ScheduleVIEW™** helps you manage the backup process with our **Backup Wizard**. CAUTION -- Backing up and Restoring your database can be dangerous if you do not know what you are doing. If you were to try restoring from an old backup that was very very old, it will overwrite your existing database with the old file. USE CAUTION when backing up and restoring your database. You can always browse to the database and do a windows "Copy" and "Paste" it to another location in lieu of backing up.

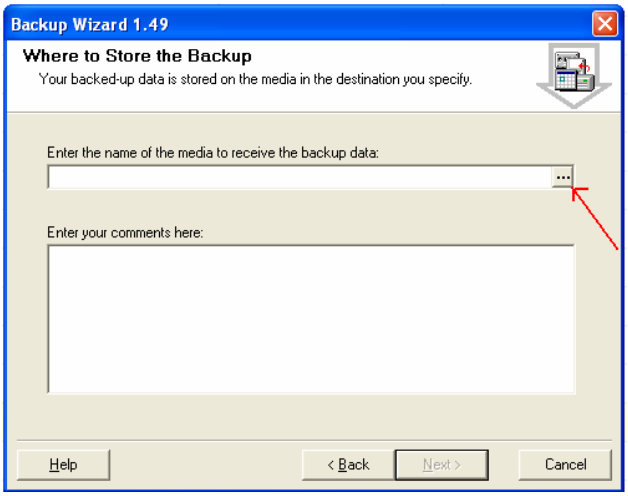
Click on 'File' 'Backup'



Select your database files for backup from this screen and click 'Next'

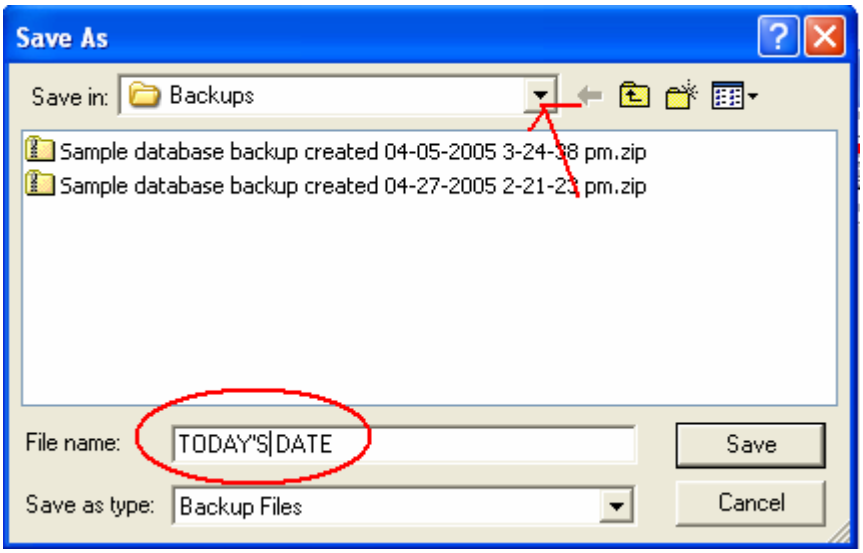
Please remember if you are using multiple databases you will have to select each of these as Additional Files. ***As a minimum you should backup your active database.*

Click 'Next'


Backup Wizard 1.49
Where to Store the Backup
Your backed-up data is stored on the media in the destination you specify.
Enter the name of the media to receive the backup data:
Enter your comments here:
Help
< Back
Next >
Cancel

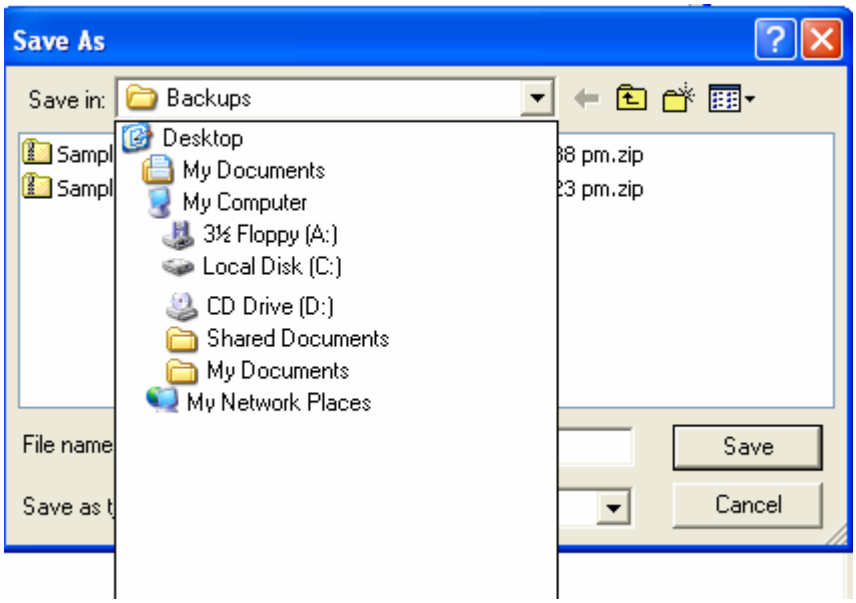
Click on the button which has 3 periods

We recommend that you back up to something other than the 'C' drive of the workstation or server that ScheduleVIEW™ is installed on. Preferably this would be a CD Rom, Zip drive or other removable storage media.



If you want to change the 'Save In' location click on the drop-down arrow

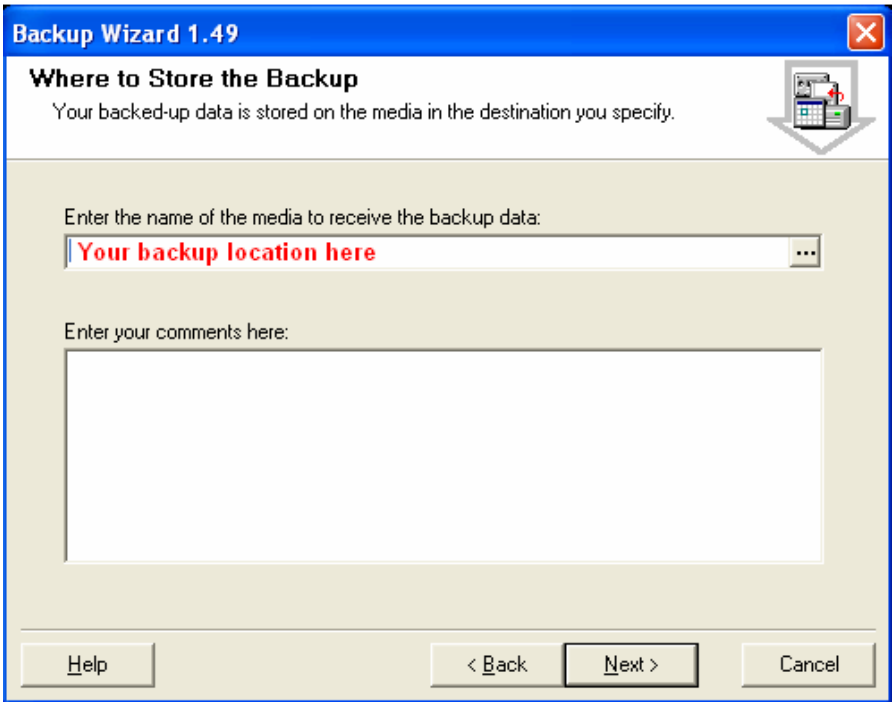
(If you have done a backup before, the 'Save In' will default to the same location so you only have to change your 'File Name' to the current date.)



Choose your backup location

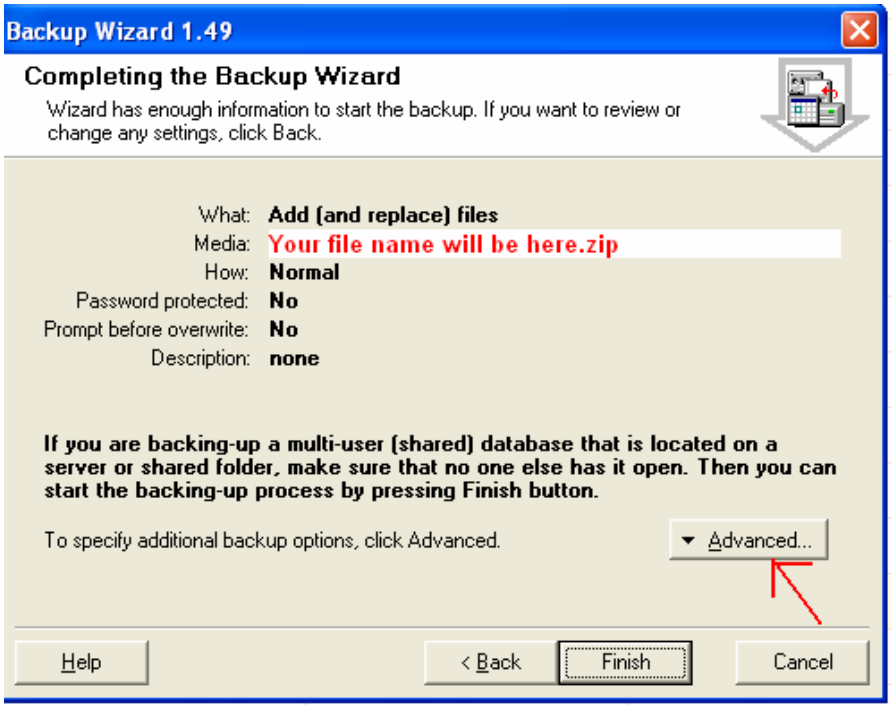
Choose a 'File Name'

Click 'Save'


Backup Wizard 1.49
Where to Store the Backup
Your backed-up data is stored on the media in the destination you specify.
Enter the name of the media to receive the backup data:
Your backup location here
Enter your comments here:
Help
< Back
Next >
Cancel

This takes you back to the 'Where to Store the Backup' window with your file name/backup location filled in.

Click NEXT


Backup Wizard 1.49
Completing the Backup Wizard
Wizard has enough information to start the backup. If you want to review or change any settings, click Back.
What: Add (and replace) files
Media: Your file name will be here.zip
How: Normal
Password protected: No
Prompt before overwrite: No
Description: none
If you are backing-up a multi-user (shared) database that is located on a server or shared folder, make sure that no one else has it open. Then you can start the backing-up process by pressing Finish button.
To specify additional backup options, click Advanced.
Advanced...
Help
< Back
Finish
Cancel

To assign a password to your backup click on 'Advanced'

(or Click Finish)

If you are backing up to a CDR or CDRW:
1. Your CDRoms must be formatted.
2. You need a program with a 'drag and drop' feature, such as Roxio.

Please Note: **ScheduleVIEW™** does not work with the Windows XP type of saving to rewriteable CDROMs. If you want to save to a CDROM, we recommend using a third party software program that treats your CDROM drive as a "floppy" drive for read and write purposes such as the commercial versions of Nero or Roxio CD Creator.

You know you have the correct type of CDR/W software installed IF when you insert the CDRW disc into the CDRW drive, you get a message from Roxio or Nero telling you the CDRW disc can now be treated as a "Floppy Disk".

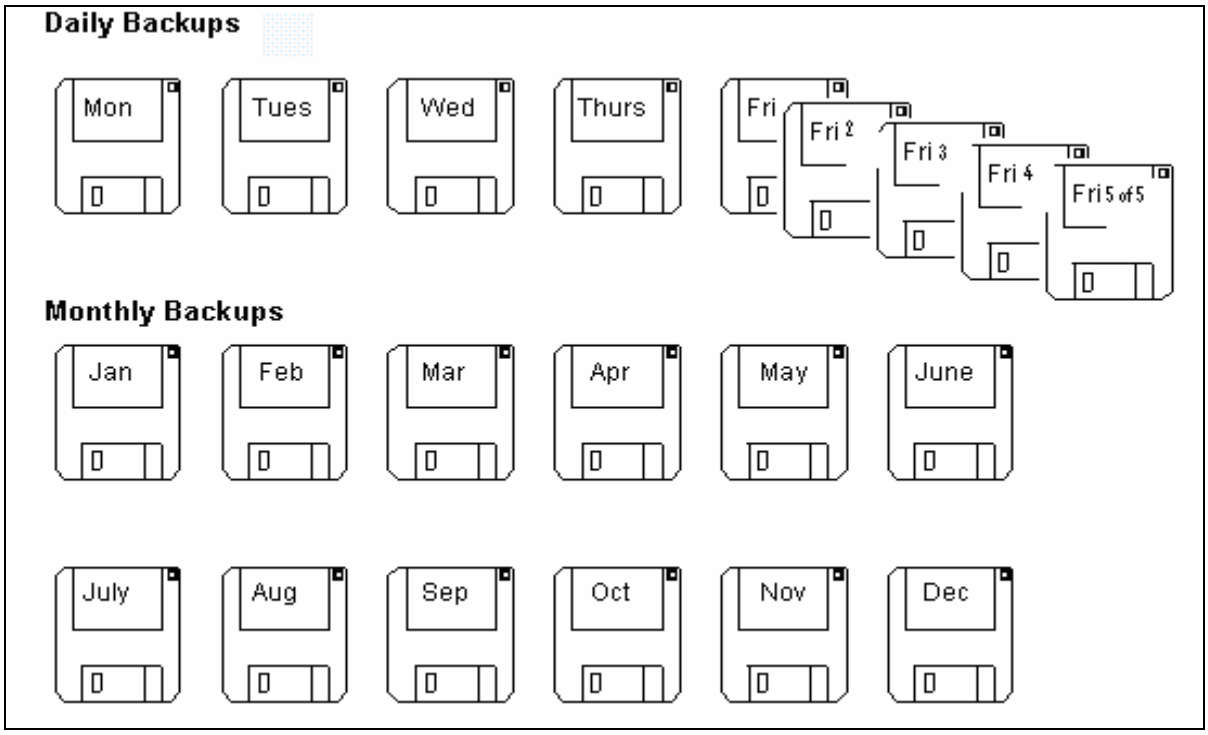
Another way to check is to right click on a file in Windows Explorer, choose Copy; then browse to the CDRW disk, browse to the root directory, and Paste the file to the CDRW. Immediately browse to the CDRW again and see if the file is there; if it is not, or if you get any kind of Windows XP message that the file will be added later, you do NOT have the correct software for writing directly to your CDRW.

We do not provide technical support for this process. Please check with your network administrator or computer consultant for assistance in this matter.

RECOMMENDED BACKUP PROCEDURE .

Each Database that is set up in your **ScheduleVIEW™** program should have its own set of disks. Here is the recommended sample of backup disks/CDROMs

***You will need to Open each individual database and back up each one separately.



- ✓ **REMEMBER TO BACKUP YOUR DATABASE DAILY**
- ✓ **WE RECOMMEND WEEKLY BACKUPS BE STORED IN**
- ✓ **AN OFFSITE LOCATION**
- ✓ **REMEMBER TO 'COMPACT AND REPAIR' WEEKLY**

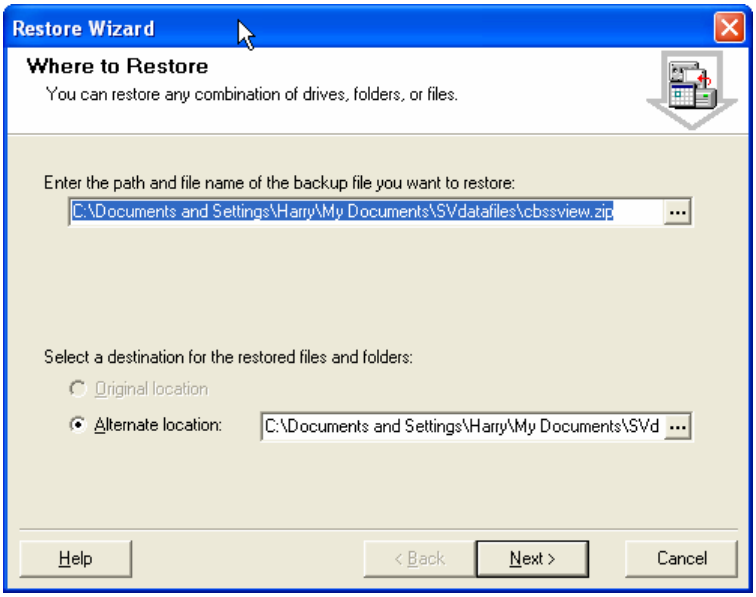
**Once a week take the backup off-site.
**A good place to store the monthly backup disk is in a safety deposit box at your bank.

➢ THE RESTORE WIZARD

To access the Restore Wizard, select **File** from the **Main Menu**, then **Restore**.

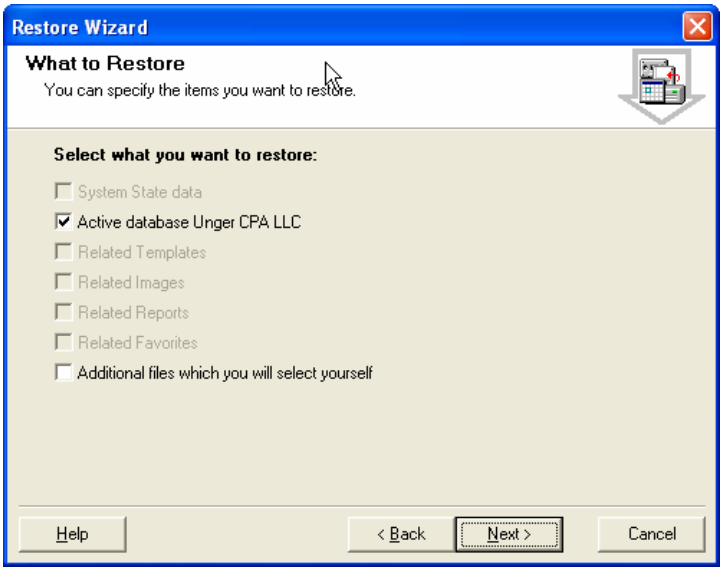
CAUTION-- Restoring a database will permanently DELETE/OVERWRITE your existing database so be sure that is what you want to do before proceeding. You may want to backup your current database before restoring from an older backup.

If you have backed up before, the last information from the last backup will appear here, if that is correct, just Click NEXT.

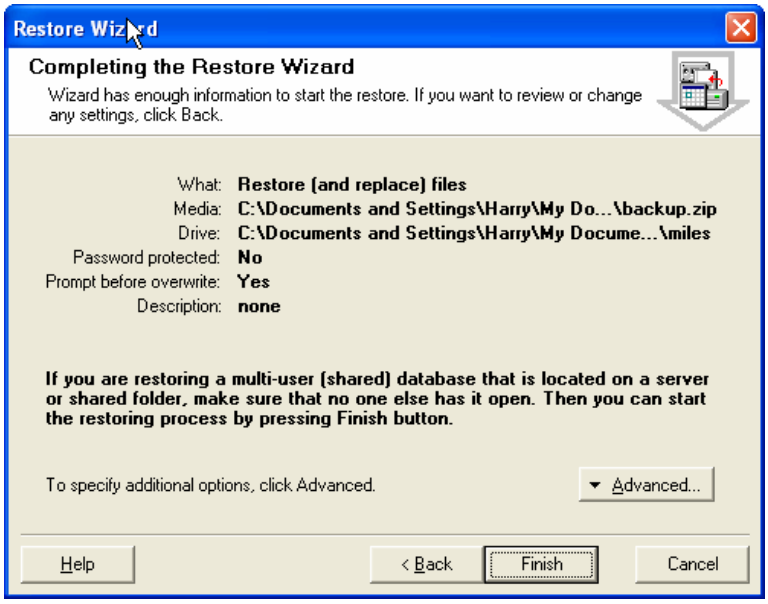

Restore Wizard
Where to Restore
You can restore any combination of drives, folders, or files.
Enter the path and file name of the backup file you want to restore:
C:\Documents and Settings\Harry\My Documents\SVdatafiles\cbssview.zip
Select a destination for the restored files and folders:
Original location
Alternate location:
C:\Documents and Settings\Harry\My Documents\SVd
Help
< Back
Next >
Cancel

If not, enter the media where you will be storing your backup data by Clicking on the ... icon.

Then Select a destination for the Restored files. This is usually your network drive where you usually save\store your database file.



Then click Next and select what you want to restore. If you are trying to restore your database, be sure to select ACTIVE DATABASE, and if any other files are available for restoring, you will be given a chance to "Check" them on this screen for restoring; then click NEXT...


Restore Wizard
Completing the Restore Wizard
Wizard has enough information to start the restore. If you want to review or change any settings, click Back.
What: Restore (and replace) files
Media: C:\Documents and Settings\Harry\My Do...\backup.zip
Drive: C:\Documents and Settings\Harry\My Docume...\miles
Password protected: No
Prompt before overwrite: Yes
Description: none
If you are restoring a multi-user (shared) database that is located on a server or shared folder, make sure that no one else has it open. Then you can start the restoring process by pressing Finish button.
To specify additional options, click Advanced.
Advanced...
Help
< Back
Finish
Cancel

Click on FINISH to complete Restoring.

COMPACT & REPAIR

We HIGHLY recommend running Compact and Repair on a weekly basis.

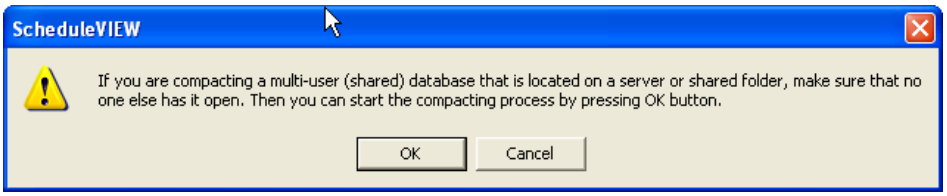
Important to Know!

If you are using **ScheduleVIEW™** in a Network, please make sure that all users are logged off **ScheduleVIEW™** before performing this task – otherwise they may damage the database even

Always do a BACKUP before doing Compact and Repair.

Compact and Repair will help you compress your **ScheduleVIEW™** and ensure that if there are any indexing errors, they will be resolved.

To access the Compact & Repair Wizard:
Click **File** **Maintenance** **Compact & Repair.**

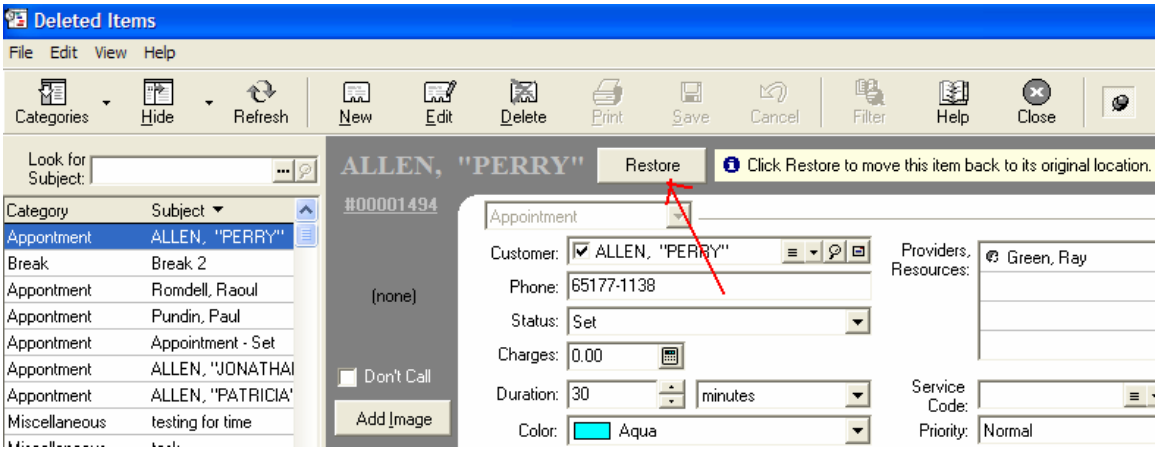

ScheduleVIEW
If you are compacting a multi-user (shared) database that is located on a server or shared folder, make sure that no one else has it open. Then you can start the compacting process by pressing OK button.
OK
Cancel

**Confirm no one is accessing the database

Click **OK** to compact the database.

RESTORING DELETED DATA

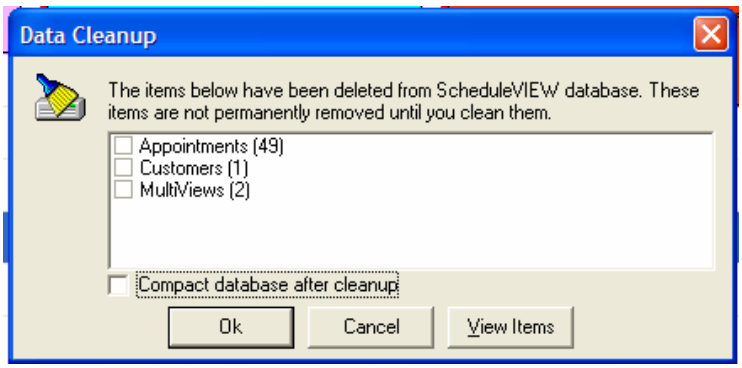
ScheduleVIEW™ does not automatically remove deleted items from the database when you "delete". Instead, they are stored in the database as items marked for deletion. To view deleted data, select **Edit** and then **Deleted Items**.



To restore a deleted item, select the item from the list of deleted items on the left and then press the **Restore** button.

DATA CLEANUP

To improve the performance of your database, execute the **Data Cleanup Wizard** by selecting **File, Maintenance,** and finally **Data Cleanup.** The following window will appear.



Select which items you wish to permanently remove from the database and check **Compact Database after Cleanup** to compress the database. ****Always do a BACKUP before Data Cleanup**

Run data cleanup if ScheduleVIEW™ is:
A) Running Slow
B) Appears to be losing appointments
C) The Reports are incorrect

ARCHIVING DATA

Archiving is a way to remove old Customers, Providers and/or Appointments to make your existing database smaller - however it does permanently delete old data. An archived backup database may be created in the process which may be accessed for informational purposes only.

Caution -- Caution -- Caution --- Caution

Archiving will delete customers, providers and/or appointments from your database. IT IS EXTREMELY IMPORTANT THAT YOU BACKUP YOUR DATABASE BEFORE ARCHIVING. USE THIS FEATURE AT YOUR OWN RISK. ARCHIVING WILL DELETE INFORMATION FROM YOUR DATABASE AND IF YOUR DATABASE IS CORRUPT, MORE INFORMATION THAN YOU THINK MAY BE DELETED OR DAMAGED. BE SURE YOU HAVE AT LEAST TWO CURRENT BACKUPS BEFORE PROCEEDING!

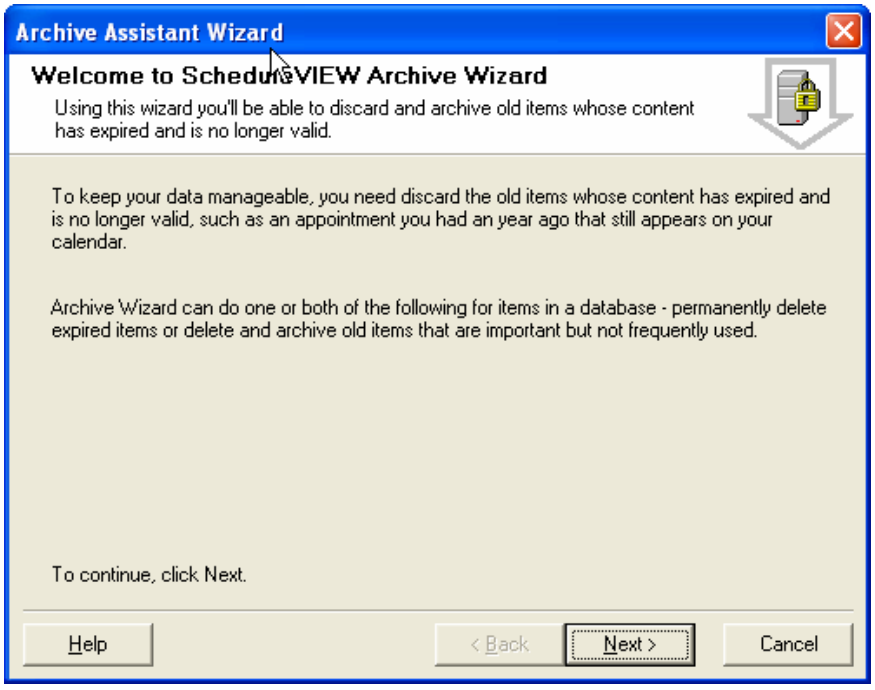
Caution -- Caution -- Caution --- Caution

When you archive information, you cannot restore the information into your existing database again after you archive so be extremely careful when using this part of the program. The only way to get the information back that you archived is to restore your old database from a backup, so be sure you perform a two backups before proceeding.

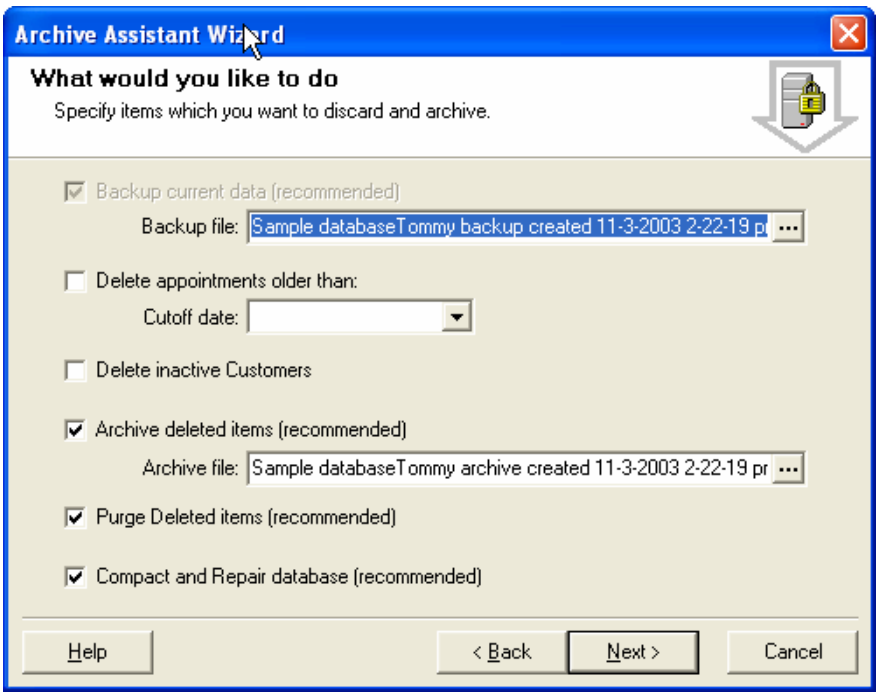
You may later view your archived database, but it will be separate from your existing database.

The **ScheduleVIEW™** Archive Wizard accomplishes multiple steps in one easy process including backup of data, deletion of inactive customers and old appointments, purging (permanent removal) of deleted items and compact and repair of the database.

Click on 'File' 'Maintenance' 'Archive'


Archive Assistant Wizard
Welcome to ScheduleVIEW Archive Wizard
Using this wizard you'll be able to discard and archive old items whose content has expired and is no longer valid.
To keep your data manageable, you need discard the old items whose content has expired and is no longer valid, such as an appointment you had an year ago that still appears on your calendar.
Archive Wizard can do one or both of the following for items in a database - permanently delete expired items or delete and archive old items that are important but not frequently used.
To continue, click Next.
Help
< Back
Next >
Cancel

'Click Next'


Archive Assistant Wizard
What would you like to do
Specify items which you want to discard and archive.
Backup current data (recommended)
Backup file: Sample databaseTommy backup created 11-3-2003 2-22-19 pr
Delete appointments older than:
Cutoff date:
Delete inactive Customers
Archive deleted items (recommended)
Archive file: Sample databaseTommy archive created 11-3-2003 2-22-19 pr
Purge Deleted items (recommended)
Compact and Repair database (recommended)
Help
< Back
Next >
Cancel

Backup file (RECOMMENDED); *****IMPORTANT*** Be sure to specify a valid location for your backup file--** IF you do not specify a valid location and you continue the Archive process and decide after archiving that you want your "old" data back, you WILL ONLY BE ABLE TO DO SO IF YOU HAVE A VALID BACKUP prior to the Archive process. Click ... icon to browse to your backup folder. Do not backup to a CDR or CDRW disk as **ScheduleVIEW™** cannot write directly to your CD ROM drive in this part of the program.

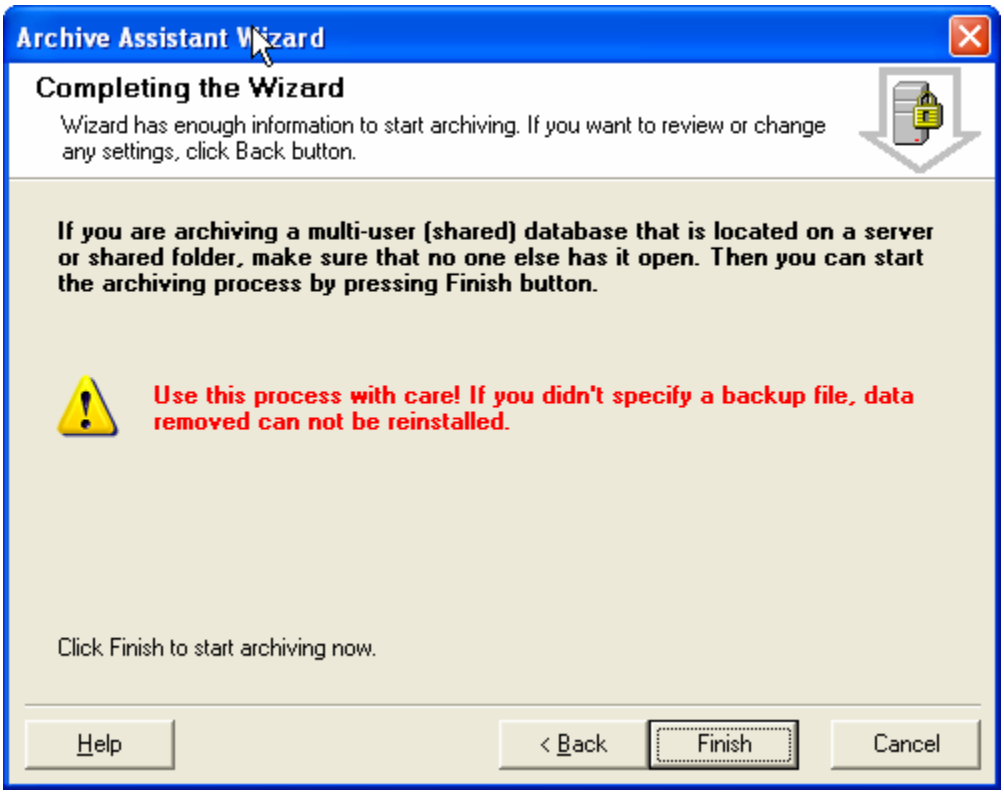
Delete appointments older than Cutoff Date; Check this box if you want to delete old appointments. ****IMPORTANT**** ALL APPOINTMENTS BEFORE THIS DATE WILL BE DELETED so be careful what date you enter here. DO NOT ENTER TODAY"S DATE or else all appointments up to today will be deleted. (Using the 'Archive Deleted Items' is highly recommended.)

Delete inactive Customers; Check this box to indicate that you want to delete all customers that have the "INACTIVE" box checked in their customer information screen.

Archive deleted items (Recommended); Check this box to create a separate archived database of the deleted appointments and customers that get deleted from the Archive Process. **IF YOU DO NOT USE THIS FEATURE (TO ARCHIVE DELETED ITEMS), YOUR INFORMATION IS PERMANENTLY DELETED.** This will allow you to go in and "VIEW" the old appointments and deleted customers, but this is only a "view" process and you cannot do anything else with this database. Click ... icon to browse to your archive folder.

Purge Deleted items (**Recommended**); check this box to actually "Purge or Delete" the items that have been marked for deletion in your database. NOTE: when you delete a customer; provider; service code, etc from the database, you actually only "Mark it for deletion". This is so that you can "undo" a mistake at a later time. However, if you actually want to purge all of this data from your database, you can check this box during the archive process to delete all the items marked for deletion.

Compact and Repair Database (Recommended): Check this box to perform a "Compact and Repair" of the database after the Archive process.

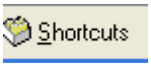

Archive Assistant Wizard
Completing the Wizard
Wizard has enough information to start archiving. If you want to review or change any settings, click Back button.
If you are archiving a multi-user (shared) database that is located on a server or shared folder, make sure that no one else has it open. Then you can start the archiving process by pressing Finish button.
Use this process with care! If you didn't specify a backup file, data removed can not be reinstalled.
Click Finish to start archiving now.
Help
< Back
Finish
Cancel

Click FINISH if you are sure you want to perform the Archive task and be sure that no other users have the program open when performing this task.

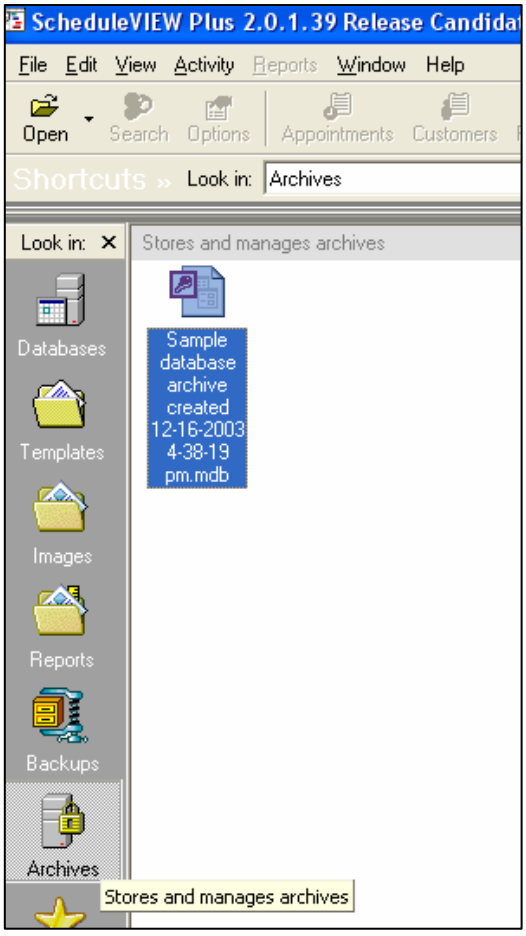
If you choose **'Delete appointments older than Cutoff Date':**

ScheduleVIEW
You are attempting to view appointments PRIOR to the last archive date.
You can only view current appointments that are not archived so the system is preventing you from going back further in time.
OK

when you attempt to scroll back through your calendar past that date you will get this warning:

To view your archives click on 'Shortcuts' 

at the bottom of your calendar page.



Next click on 'Archives' in the left column and your archived files will be shown.

Double-click on the one you choose and it will open to be able to view your files. (If you password protected it, you will be prompted to enter User Name and Password)

-- You will be able only to view appointments in the 'Archives' date range.

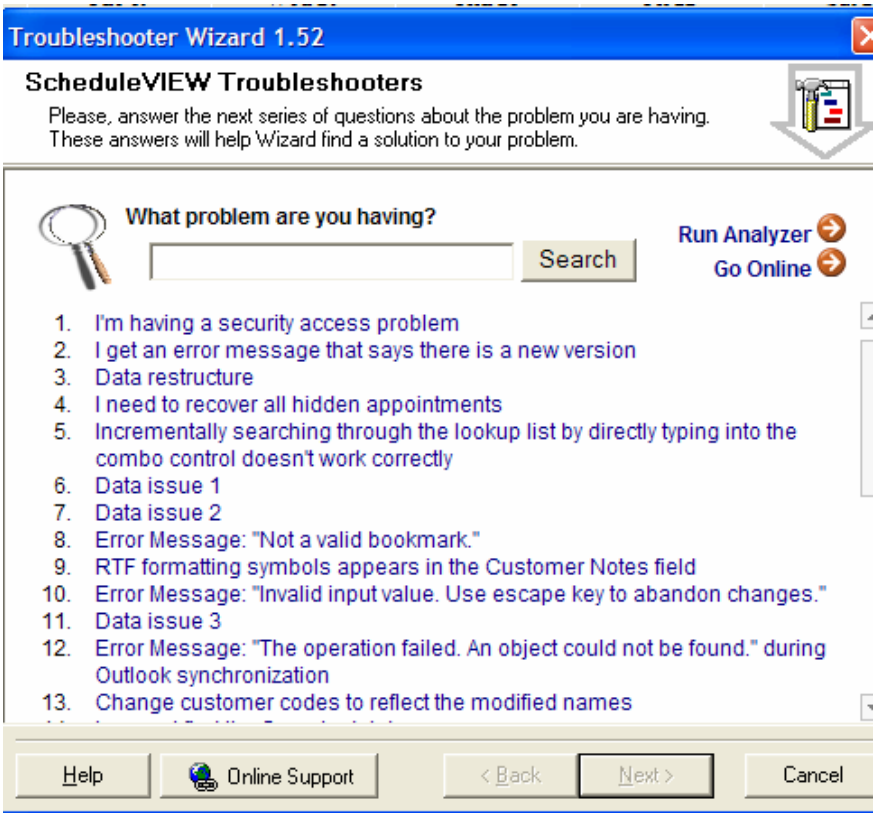
--You will be unable to make any changes in your schedule as long as you are in the archive.

To return to your calendar to view your current database: close and re-open **ScheduleVIEW™** PLUS.

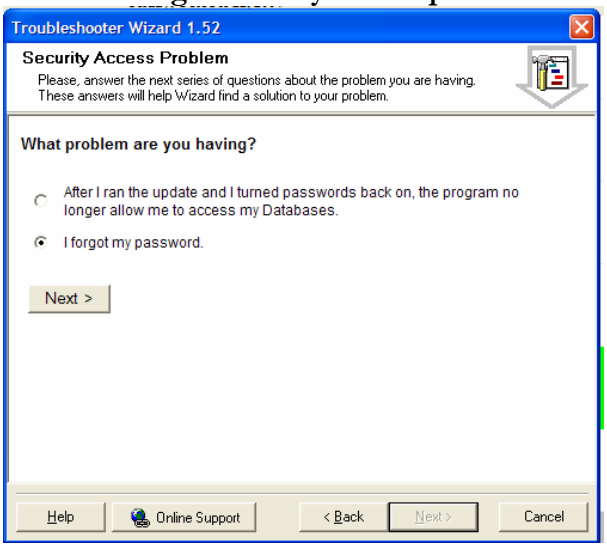
TROUBLESHOOTING WIZARDS

CAUTION: backup your database before performing a Troubleshooting Wizard.

Click on 'Help' 'Troubleshooter' 'Next' If you see your problem listed, highlight it, click on 'Next'


Troubleshooter Wizard 1.52
ScheduleVIEW Troubleshooters
Please, answer the next series of questions about the problem you are having.
These answers will help Wizard find a solution to your problem.
What problem are you having?
Search
Run Analyzer
Go Online
1. I'm having a security access problem
2. I get an error message that says there is a new version
3. Data restructure
4. I need to recover all hidden appointments
5. Incrementally searching through the lookup list by directly typing into the combo control doesn't work correctly
6. Data issue 1
7. Data issue 2
8. Error Message: "Not a valid bookmark."
9. RTF formatting symbols appears in the Customer Notes field
10. Error Message: "Invalid input value. Use escape key to abandon changes."
11. Data issue 3
12. Error Message: "The operation failed. An object could not be found." during Outlook synchronization
13. Change customer codes to reflect the modified names
Help
Online Support
< Back
Next >
Cancel

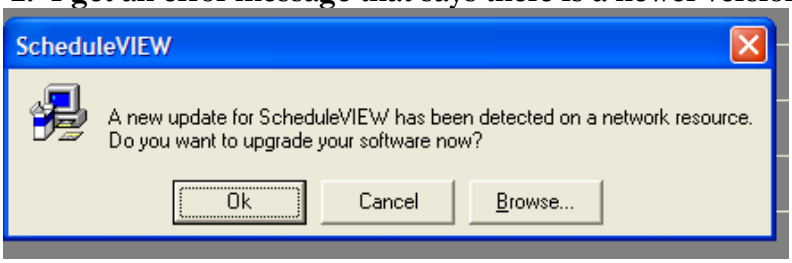
1. I'm having a security access problem.


Troubleshooter Wizard 1.52
Security Access Problem
Please, answer the next series of questions about the problem you are having.
These answers will help Wizard find a solution to your problem.
What problem are you having?
After I ran the update and I turned passwords back on, the program no longer allow me to access my Databases.
I forgot my password.
Next >
Help
Online Support
< Back
Next >
Cancel

Choose Troubleshooter #1 if:

I forgot my password
-or-
I am having trouble logging in .

2. I get an error message that says there is a newer version.


ScheduleVIEW
A new update for ScheduleVIEW has been detected on a network resource.
Do you want to upgrade your software now?
Ok
Cancel
Browse...

Choose Troubleshooter #2 if:

When I open ScheduleVIEW™ I get a message that there is a newer version, but I already have the newest version.

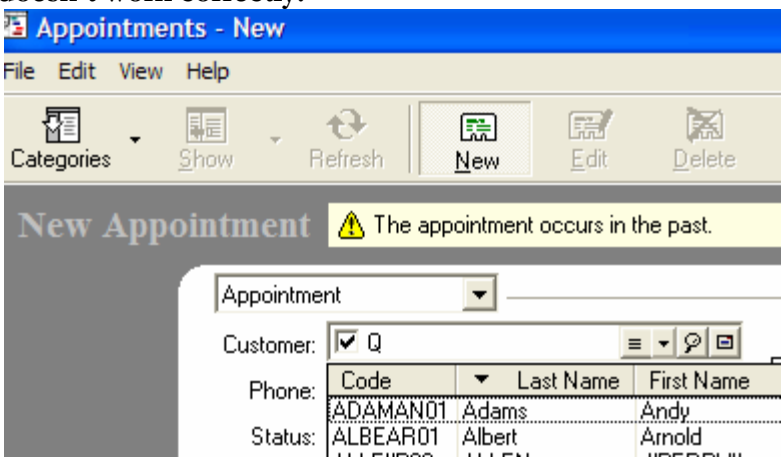
3. Data restructure.

Use this troubleshooter only if instructed to do so by ScheduleVIEW™ tech support. **Please note that you need to call ScheduleVIEW™ tech support first to get an authorization code.**

4. I need to recover all hidden appointments.

Use Troubleshooter #4 if:
I have missing appointments. **Please note that you need to call ScheduleVIEW™ tech support first to get an authorization code.**

5. Incrementally searching through the lookup list by directly typing into the combo control doesn't work correctly.



Choose Troubleshooter #5 if:

When making an appointment I type in a letter and the search goes to another letter.

6. Data issue 1

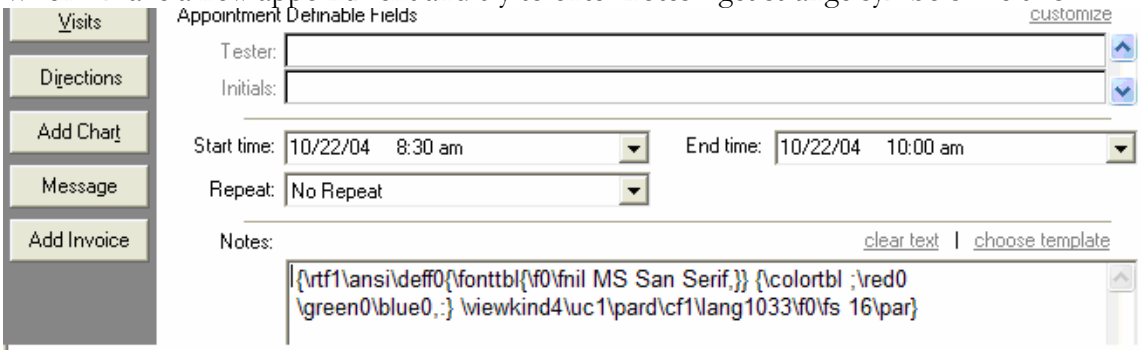
Use this troubleshooter only if instructed to do so by ScheduleVIEW™ tech support. **Please note that you need to call ScheduleVIEW™ tech support first to get an authorization code.**

7. Data issue 2
Use this troubleshooter only if instructed to do so by ScheduleVIEW™ tech support.
Please note that you need to call ScheduleVIEW™ tech support first to get an authorization code.

8. Error Message: "Not a valid bookmark"
Use Troubleshooter #8 if:
I get the error 'Not a valid bookmark' when attempting to open ScheduleVIEW™

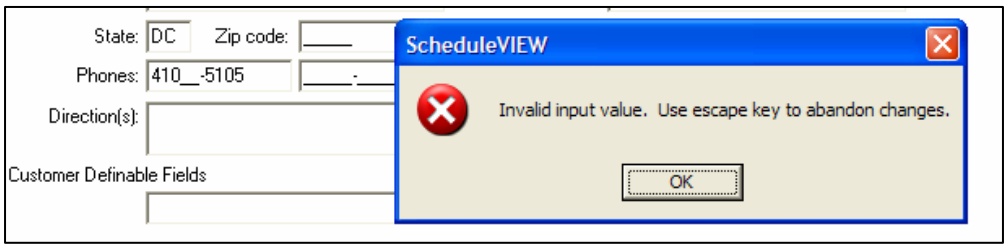
9. RTF formatting symbols appear in the Customer Notes field.
Choose Troubleshooter #9 if::

When I make a new appointment and try to enter notes I get strange symbols like this



Cause - This may happen when you continue using an older program version after database conversion due new upgrade installed.

10. Error Message: 'Invalid input value. Use escape key to abandon change.'
Use Troubleshooter #10 if:
I get this error when putting in new/or editing customers.



Cause: This may happen when you attempt to enter an invalid character such as letters into the phone number field.

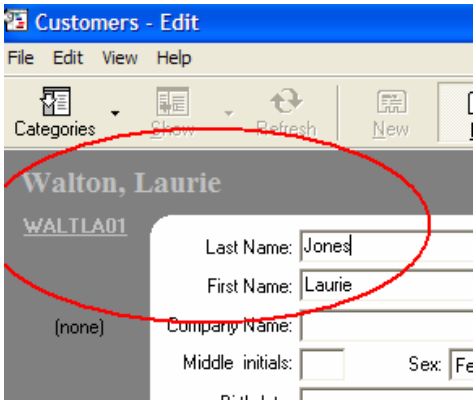
11. Data issue 3

Use this troubleshooter only if instructed to do so by ScheduleVIEW™ tech support.
Please note that you need to call ScheduleVIEW™ tech support first to get an authorization code.

12. Error Message: 'The operation failed. An object could not be found' during Outlook synchronization.

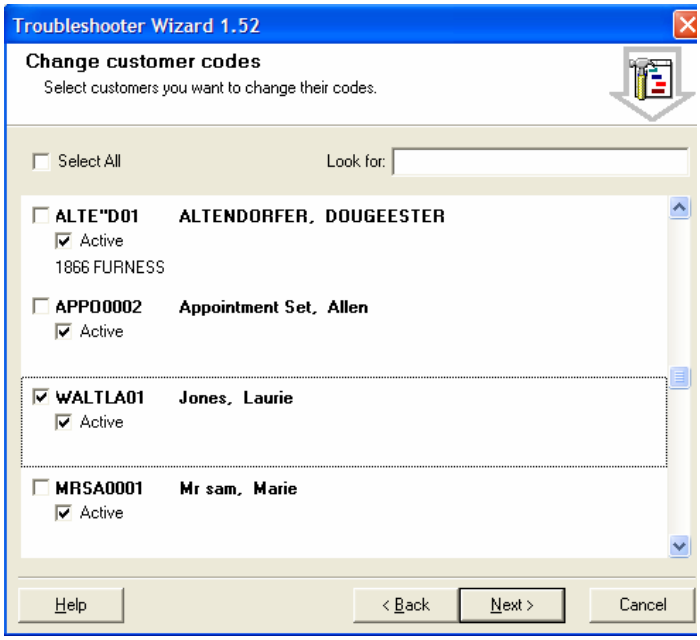
Use Troubleshooter #12 if:
I get this error, after setting up the sync with Outlook and ScheduleVIEW™ , when I click on 'Sync Now'.

13. Change customer codes to reflect the modified names.

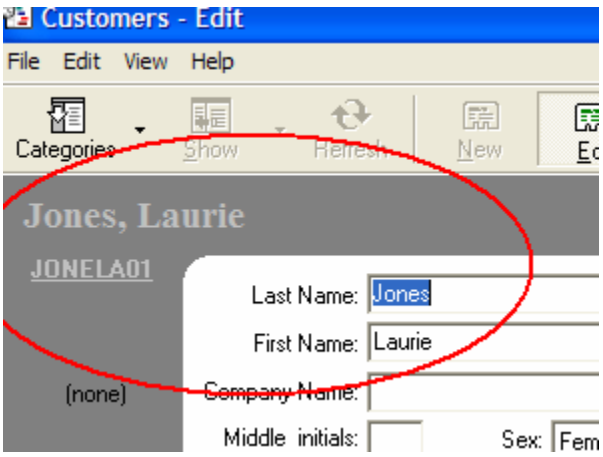


Choose Troubleshooter #13 if:

My Customer code and Last Name do not match. This happens if one of your customers changes their name.



Choose the customer you want to change,



and the code will be corrected:

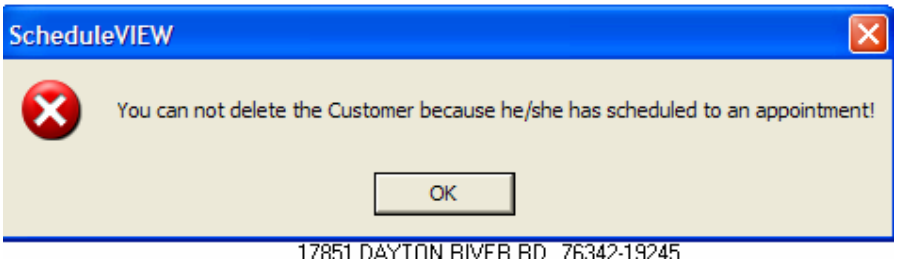
14. I can not find the Sample database.
Use this troubleshooter if:
I am unable to find my sample database.

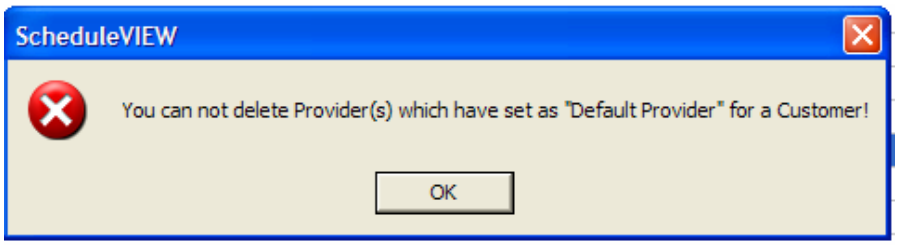
15. Error Message: 'Internet Explorer was unable to link to the Web page you requested. The page might be temporarily unavailable'
Use Troubleshooter #15 if:
I get this error when I click on the Home|Today screen.

16. When I open up ScheduleVIEW™ it pops up the Windows Dialup connection screen.
Use Troubleshooter #16 if:
When I open up ScheduleVIEW™ it pops up the Windows Dialup connection screen.

17. Run Analyzer
Use Troubleshooter #17 if:
I cannot find my problem elsewhere in this list.

18. I can not delete Provider, Customer, or Service Code due to existing appointments (Data issue 4)
Use Troubleshooter #18 if:
I am trying to delete a Provider, Customer or Service Code and get one of these, or a similar error:


ScheduleVIEW
You can not delete the Customer because he/she has scheduled to an appointment!
OK
17851 DAYTON RIVER RD 76342-19245



19. Data Issue 5
Use this troubleshooter only if instructed to do so by ScheduleVIEW™ tech support. **Please note that you need to call ScheduleVIEW™ tech support first to get an authorization code.**

20. Error Message: 'ADO could not find the specified provider.'
Use Troubleshooter #20 if:
I get this error when trying to open a database.

21. I receive error messages containing Quickbooks status code 1000 during Quickbooks synchronization.
Use Troubleshooter #21 if:
When I try to sync ScheduleVIEW™ with QuickBooks™ I get errors containing 'status code 1000'.

22. Error Message: 'Field "EditMasks" already exists in table "parameters." '
Use Troubleshooter #22 if:
After upgrading ScheduleVIEW™ or installing an update I get this error.

23. I want to reinstall an archived database (Data issue 6)
Use Troubleshooter #23 if:
I want to reinstall a database that was archived. **Please note that you need to call ScheduleVIEW™ tech support first to get an authorization code.**

24. Data issue 7
Use this troubleshooter only if instructed to do so by ScheduleVIEW™ tech support. **Please note that you need to call ScheduleVIEW™ tech support first to get an authorization code.**

25. I want to change misspelled Company Names (Data issue 8)
Use Troubleshooter #24 if:
I want to correct the misspelling of some of my 'Company Names'. **Please note that you need to call ScheduleVIEW™ tech support first to get an authorization code.**

26. Error Message: 'Table ZLAppointments' already exists'
Use Troubleshooter #26 if:
I get this error when working with ScheduleVIEW™.

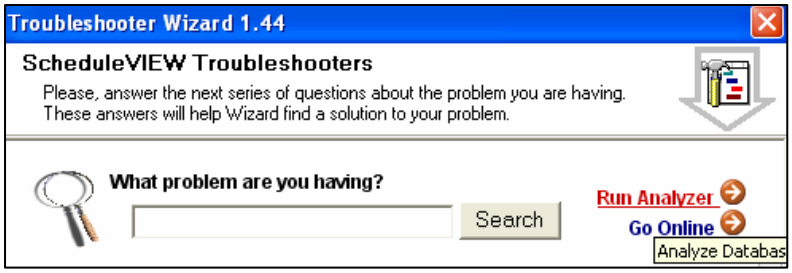
27. None of the above.
Use Troubleshooter #27 if:
I cannot find my problem elsewhere in this list.

TROUBLESHOOTING ANALYZER

If you do not see your problem listed in the Troubleshooting Wizards, run the Troubleshooting Analyzer:

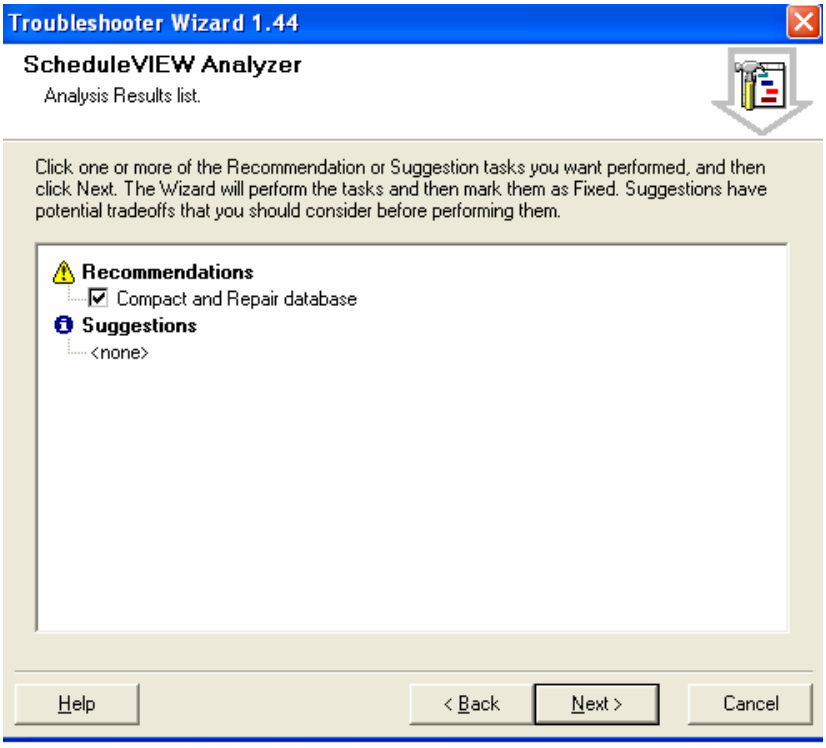
Click on 'Help' 'Troubleshooter' 'Next'

******CAUTION: Before running Analyzer, please be sure to make a backup of your database or copy your database to a different location using windows copy and paste techniques. ******


Troubleshooter Wizard 1.44
ScheduleVIEW Troubleshooters
Please, answer the next series of questions about the problem you are having.
These answers will help Wizard find a solution to your problem.
What problem are you having?
Search
Run Analyzer
Go Online
Analyze Databas

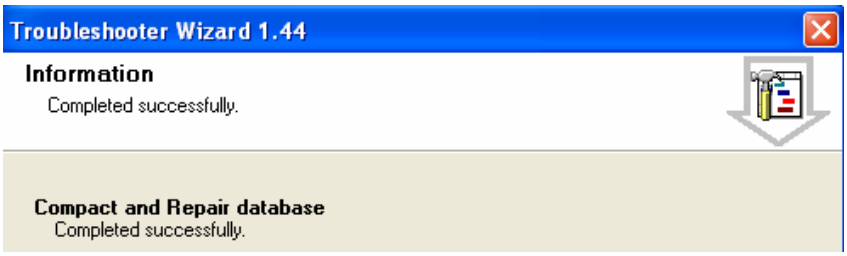
Click on 'Run Analyzer'

Click on: To continue, click here.


Troubleshooter Wizard 1.44
ScheduleVIEW Analyzer
Analysis Results list.
Click one or more of the Recommendation or Suggestion tasks you want performed, and then click Next. The Wizard will perform the tasks and then mark them as Fixed. Suggestions have potential tradeoffs that you should consider before performing them.
Recommendations
Compact and Repair database
Suggestions
<none>
Help
< Back
Next >
Cancel

Choose the tasks you want ScheduleVIEW™ to run. Click 'Next'

Then Click 'Finish'



The Troubleshooter will list the tasks selected and report them as completed successfully.

SUPPORT POLICIES

If you continue to have trouble you may use one of our Technical Support resources:

TECHNICAL SUPPORT

1. **ScheduleVIEW™** support is available at **no charge online**:
   A. **ScheduleVIEW™** Manual is also online. Go to: http://www.scheduleview.com and click on the 'Support' tab.
   B. For Tutorials on how to use **ScheduleVIEW™**, go to: http://www.scheduleview.com/learning.htm
   C. For frequently asked questions regarding **ScheduleVIEW™**, go to: http://www.scheduleview.com/appointment-scheduling/faq.htm.
   D. **ScheduleVIEW™** user discussion forum is available. Go to support at: http://www.scheduleview.com , click on 'Support' and 'User Forum'

2. **ScheduleVIEW™** support **included at no charge** with your purchase:
   A. A **ScheduleVIEW™** manual is included on CD ROM.
   B. Tutorials are included on CD ROM
   C. One hour of free telephone support is included within the first 30 days of your purchase.
   D. Email technical support is included for 90 days from date of purchase of **ScheduleVIEW™** at support@scheduleview.com.

3. **ScheduleVIEW™** support is available on a **fee for service** basis:
   A. You may purchase one hour of support at $60. When you call **ScheduleVIEW™**, we will deduct the minutes from the hour you purchased in 10 minute increments.
   B. **ScheduleVIEW™** Password Recovery $30.00 per incident.
   C. Database Repair: $30.00 per incident.
   D. Lost Registration replacement: $30.00 per incident.
   E. Replacement Program CDRom: $30.00
   F. Data Conversion: $99.00 minimum, call for specific pricing.

ONLINE TUTORIALS

Our main support page can be reached at http://www.scheduleview.com/support.htm

Frequently Asked Questions (FAQ's) are available at http://www.scheduleview.com/faq.htm. Check this area for answers for updates to our FAQ's.

Our User's Forum can be reached at http://www.scheduleview.com/cgi-bin/ubb/ultimatebb.cgi Discuss issues online with other **ScheduleVIEW™** users. Share experiences, ask questions, and get (or give) answers.

Email us; send your questions or comments to support@scheduleview.com. Email inquiries usually receive a response with 24-hours. If your free support has expired, additional support can be purchased; just ask the support representative for the current fees.

PRODUCT UPGRADES

There are several ways to stay in touch with product upgrades and developments.

➢ OUR EMAIL NOTIFICATION GROUP

Join our email notification group and keep up with the latest news and developments about **ScheduleVIEW™**. Just access our main support page on the web to enter your name and email address at: http://www.scheduleview.com/support.htm

➢ CHECK FOR UPDATES

Click the **Check for Updates** option under our **Help Menu**, to check for updates that you can download immediately from the **ScheduleVIEW™** server. Or simply access our update web page at http://www.scheduleview.com/update/.

Please do a backup before upgrading your software. The update feature transmits technical information about the **ScheduleVIEW™** software being updated so downloading is possible only when an Internet connection exists. During an update, **ScheduleVIEW™** downloads only the necessary files to your computer. After you download and begin installing the upgrade, please watch VERY CAREFULLY for a screen that asks where to store the upgrade for other network users so that they do not have to go online for the update. Write down the location of the location you stored the upgrade in because other network users will need this info when they upgrade.

ONLINE TUTORIALS AND COMMONLY ASKED QUESTIONS

ScheduleVIEW™'s website includes a number of tutorials that will quickly help you learn the features and functions of **ScheduleVIEW™.** Just visit http://www.scheduleview.com/learning.htm and click one of the following tutorials:

- Making an Appointment
- Use Color Coding
- Groups and (Multiple Providers) (Column Setup)
- View Schedules in Different Views
- Using Templates
- Show Information About Appointments
- Import data from other programs
- Email Enabled
- Network ScheduleVIEW™
- Security Features
- Reminder letters\Superbills or Work Orders
- View narrative notes
- Appointment History
- Track Visits
- Change Zip Code To Postal Code
- Find Appointments (Future or All)
- View graphics\images of customer
- Show driving directions to customers
- Goldmine report
- Appointment list
- Revenue generation report
- Productivity Report
- Security\password access
- Available Reports

Please Note: These topics are subject to change based on the most common questions we are receiving.